GoldMine User Guide

FrontRange
S O L U T I O N S ®

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Welcome to GoldMine® Premium Edition

Overview

GoldMine is a powerful tool designed to automate and manage your day-to-day business activities. Maintain business relationships, manage time, establish and achieve goals more easily than ever before with new features and enhancements in GoldMine Premium Edition.

GoldMine automates key areas of daily business activity:

- Client/contact management
- Time and task management
- Document and email management
- Sales management
- Service management

For additional support, please visit: http://www.frontrange.com and http://www.frontrange.com/community.

What's New in GoldMine

GoldMine supports a variety of business processes with improved efficiency and automated administration. New features and enhancements make GoldMine Premium Edition more powerful and easy to use than ever.

- **New User Interface.** GoldMine Premium Edition has been designed with a sleek, modern look and feel. Navigation, automation, and communication are now more streamlined and uniform, for improved workflow efficiency and ease-of-use.

- **Customer Service Module (Service Center).** GoldMine Premium Edition includes a Customer Service Center module for tracking, resolving, and reporting customer service cases for GoldMine contacts.

- **Tabbed View.** Quicker navigation between open windows is now possible in GoldMine Premium Edition, thanks to a new tabbed view that utilizes available screen space more effectively. To enter the tabbed view, simply maximize any open window in the GoldMine workspace.

- **Microsoft Windows Vista Support.** Install GoldMine on Microsoft's latest operating system. For more information, please refer to the GoldMine Premium Edition Installation Guide.

- **Microsoft Office 2007 Support.** GoldMine Plus for Microsoft Office, now part of the standard GoldMine installation, supports Microsoft Word and Excel 2007.

- **New Postal Code Import QuickStart Wizard.** Add over 42,000 United States Postal Codes to your database with one click using this new QuickStart Wizard.

- **Firebird Native Driver.** The Firebird Native Driver is now used for the most time-intensive operations, providing a 400% performance improvement for the slowest operations when using Firebird databases. Underlying code changes provide additional 40% performance improvements when using MSSQL databases as well.

- **Auto-complete** capability has been added, improving speed and accuracy during such tasks as entering field data, or adding recipients to e-mail messages.

- **Tip of the day** offers helpful information about various features in GoldMine each time you open the application.

About This Guide

This guide introduces you to the main features in GoldMine® Premium (GoldMine) and provides you with answers to basic questions about how it works and provides definitions and procedures for basic functionality.

Audience and Expertise

The information in this guide is intended for users who will use the features of GoldMine.

This material assumes users have a fundamental working knowledge of the following:

- Computers and databases
- Microsoft Windows operating system
- FrontRange Solutions and/or GoldMine software

GoldMine system administrators must have a higher level of expertise.

Document Conventions

Example	Description
File>>Print	Menu bar commands (in this example, select **File** on the menu bar, then select **Print** in the drop-down menu)
The **Select a Data Source** dialog box opens.	Dialog boxes and menu items in bold
OK OK	Button names
Note	Additional information
CAUTION/WARNING	Critical information to prevent functionality or data loss

Resources

- *GoldMine 8.5 Administrator Reference Guide*

- *GoldMine 8.5 Installation Guide*

Manuals are available in PDF format from the Installation CD-ROM, the NetUpdate download, or from support.frontrange.com for maintenance customers.

Contact Us

Support Site

FrontRange Solutions can answer your technical support questions about HEAT, GoldMine, GMEE, and IT Service Management. Visit: support.frontrange.com

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Offices are also located in Los Angeles, United Kingdom, Germany, Italy, South Africa, Australia, Singapore, and China.

Getting Started

This section provides information to help you understand and use the application.

Key Terms and Concepts

The following is a list of GoldMine key terms and concepts.

- **Activity List.** A categorized list of activities associated with a particular contact record or assigned to a GoldMine user. Use the Activity List to view details of an activity, display the contact record linked to an activity, schedule and complete the activity, and save reference information in the history file.

- **Browse Window.** A list of contacts, Calendar events, reports, and other items. Browse windows differ from other types of windows in GoldMine because they display information in columns.

- **Calendar.** Activity information organized in tabs that access different levels and types of detail. Use the Calendar to schedule and complete activities.

- **Contact record.** Standard contact information, such as name, company, phone number, and address. Most operations in GoldMine are performed on the contact record. The contact record is the basis for scheduled work in GoldMine, acting as the link between GoldMine's Calendar and History by maintaining pending and past events related to each contact record.

  When multiple windows are open in your GoldMine work area, the title bar of an active contact record is a different color from other items occupying the work area.

- **F2 Lookup.** A data entry tool listing frequently used or code-specific entries. Security options control F2 Lookups, ensuring user input and allowing data standardization.

- **Work Area.** Displays open contact records, the Calendar, Activity List, E-mail Center, and any other open windows. Although you can open, position, and size multiple contact records in the work area, only one contact record can be active at a time.

- **Universal Search.** A one-box search to give you a summary view of the information along with links to more detailed information.

Launching GoldMine

Use the following procedure to launch GoldMine Premium Edition on your desktop computer.

1.   On the Windows desktop, select **Start>>Programs>>GoldMine** or double-click the GoldMine desktop icon.

   The GoldMine Premium Edition login window opens.

2.   Type your user name in the **Username** field, type your password in the **Password** field and then click **OK**.

Changing the Default Login

Use the following procedure to change the username and/or the password of your login.

1. Login to GoldMine using the default login.
2. To change the username, navigate to **Tools>>Options** and select the **Login** tab.
3. At the **Default Login user** field, select the new username from the drop-down menu.
4. To change the password, navigate to **Tools>>Options,** select the **Personal** tab, and then click **Change Password.**

5. At the **Change Password** dialog box, type in the old password and then the new password (twice) in the appropriate fields and then click **OK.**

Viewing Information About GoldMine Premium Edition

View summary information, credits, installation details, or contact information for FrontRange Solutions.

Use the following procedure to view information about GoldMine.

1. Select **Help>>About GoldMine.**

2. At the **About GoldMine** window, view the version, registered owner, product serial number, and copyright information. Select the following buttons to see information for:

    •   **Credits.** Displays integrated applications.

    •   **FrontRange.** Displays contact information for FrontRange Solutions.

    •   **System.** Displays information about your GoldMine installation. To copy the information, click **Copy All**. Paste the information into your outside application.

3. Click **OK.**

Navigating GoldMine

This section describes the navigation tools and procedures you can use to navigate through GoldMine.The GoldMine Main Window can display a large amount information based on your choices, and offers access to a wide array of options to manage details.

Parts of the main GoldMine window: main menu, Global Toolbar, Navigation
Pane, work area, and status bar.

NOTE: You can access the classic GoldMine menu configuration
by selecting **Tools>>Options>>System tab** and selecting the
checkbox for Use classic GoldMine menu.

Main Menu Bar

The Main Menu bar offers the first level of commands, which display in standard Windows-style pull-down menus.

FrontRange GoldMine Premium Edition - [Bea Defkow]

File   Edit   Go To   Tools   Actions   Schedule   Complete   Web   Window   Help

> **NOTE:** Menu options may be unavailable because the option does not apply to the current selection, another command option must be activated before, or security restrictions limit your menu rights. Contact your GoldMine Administrator if a menu option you need in unavailable.

Accessing Menus on the Menu Bar

Use the following procedure to access a menu on the menu bar.

1. Click on the mouse to select the menu option from the main menu.

An ellipse (...) indicates there is a submenu.

2. Select the submenu option if needed.

The appropriate dialog box, wizard, or window opens.

3. Select the menus to perform a variety of tasks:

File. Create contact records, print reports, Import/Export, and log in options. Also exit GoldMine from this menu.

Edit. Cut, copy and paste. Edit record properties. Edit, delete, and undo changes to Contact records.

Go To. Access all of Goldmine's modules, as well as Analysis, and Reporting tools.

Tools. Access GoldMine tools for synchronization, configuring GoldMine, managing databases, creating and running Automated Processes, Server Agents, globally replacing data, Synchronization tools, territory realignment, and launching the Database Alias Manager and QuickStart Wizard.

Actions. Access GoldMine communication tools, timer commands, and manage mail merge functions.

Schedule. Access scheduling options for the contact record, including scheduling a call, appointment, literature request, forecasted sale, follow-up action, and GoldMine e-mail.

Complete. Access completed action options for scheduled and unscheduled calls, appointments, sales, other actions, correspondence, and other pending activities.

Web. Access GM+Browser, web publishing, and other online options.

Window. Window display and status bar display options. Also open new contact record windows.

Help. Access GoldMine online help, the GoldMine Web site, NetUpdate, and important system information in *About GoldMine*.

Work Area

The screen's center is the **work area.** The GoldMine work area displays active windows, including any open contact records, the Calendar, the Activity List, the Email Center, Opportunities, Projects, Campaigns, the Service Center, Leads, the Knowledge Base, and the Contact Search Center. The work area also displays dialog boxes, tools, and wizards.

The following graphic shows a couple of the work area windows.
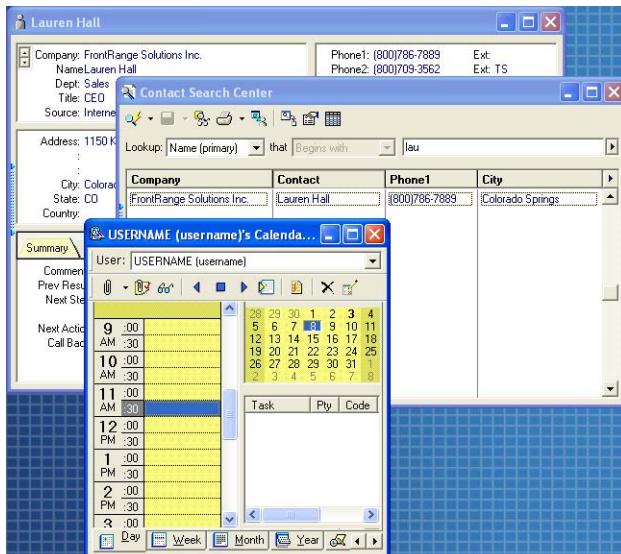
Activity Window

The Activity List Main Window contains three panes:
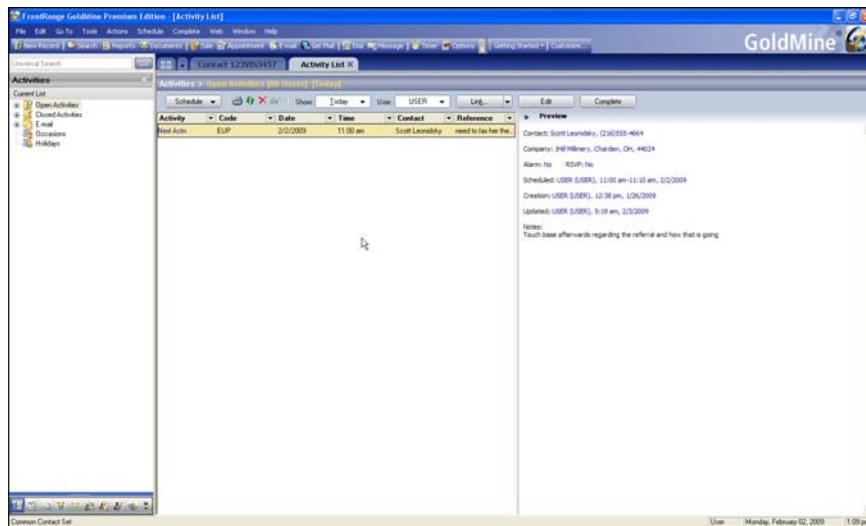
The first panel is the **Folder panel** and it lists the current activities folders. This list includes Open Activities, Closed Activities and Email activity. Open each folder by clicking on the plus sign (+). The selection you choose appears in the Activity list panel.

The second panel is the **Activities list panel** and it displays the activities, which may be sorted and filtered by any of its columns. Click on an activity and the summary information displays in the Preview panel.

The third panel is the **Preview panel** and it displays the summary information for a selected activity.

For more information and procedures on using the Activity window, see "Activities" on page 139.

Calendar

The tabs at the bottom of the window are the types of available calendars types appear at the bottom of the Calendar screen:
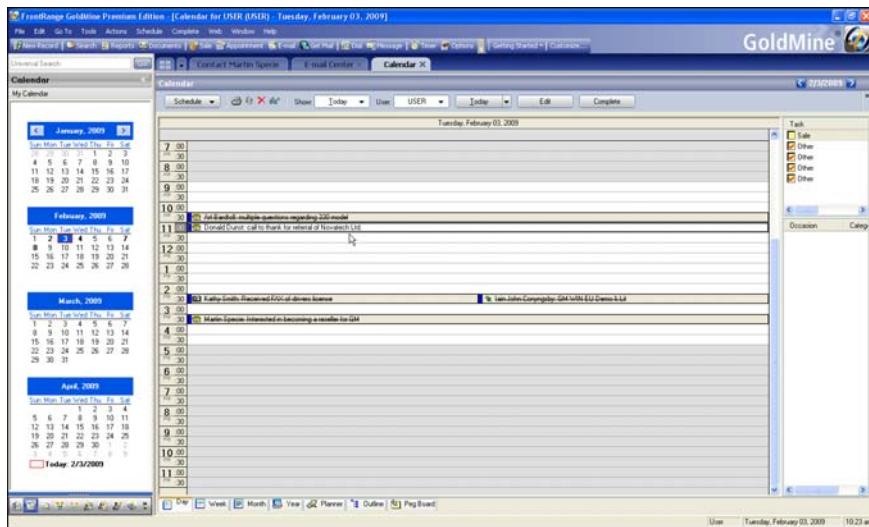
The first panel is **My Calendar** and it shows four graphical months of your calendar at a time. Click on a date and the page appears in the Calendar panel.

The second panel is the **Calendar panel** and it displays the activities for the specified date and time. Choose how the calendar displays by selecting one of the button at the bottom of the Calendar panel page:

• **Day.** A daily calendar page**.**

• **Week.** A weekly calendar page.

• **Month.** A monthly calendar page.

• **Year.** A page that shows the entire year.

• **Outline.** Displays your scheduled activities in a hierarchical tree structure.

• **Planner.** When you are scheduling activities for others, use the Planner to view their schedules.

• **Peg Board.** Shows Login status and activity of individual users and system availability.

The third panel is the **Task panel** and it lists upcoming tasks and/or occasions. Click the task or occasion to see a summary.

For more information and procedures to use the Calendar, see "Using the Calendar" on page 173.

Mail

This work window is a fully navigable browser for the Email Center.
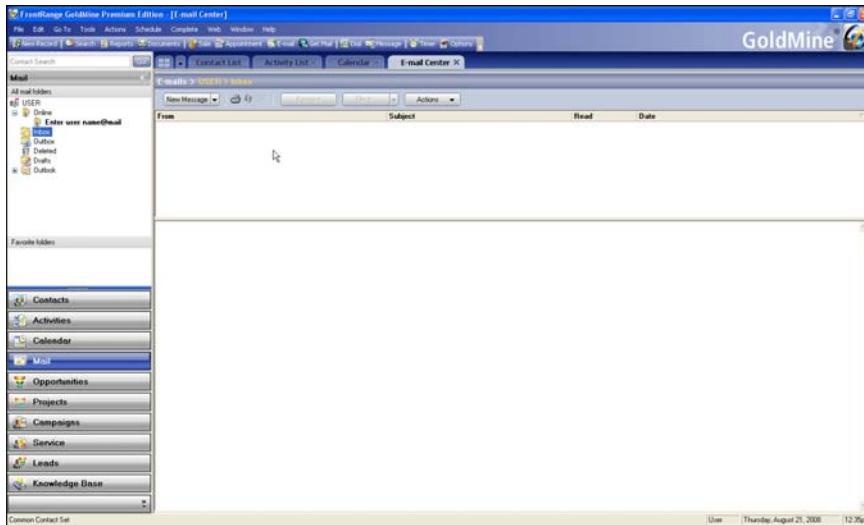
The first panel is the **Mail Folders panel** and it lists all mail folders of the user. Click on the folder and it will appear in the Mail panel.

The second panel is the **Mail panel** and it displays the selections from the Mail Folder panel. Note that the click path appears at the top of the panel. For more information on the Mail Center, see "Using the E-mail Center" on page 207.

Opportunities
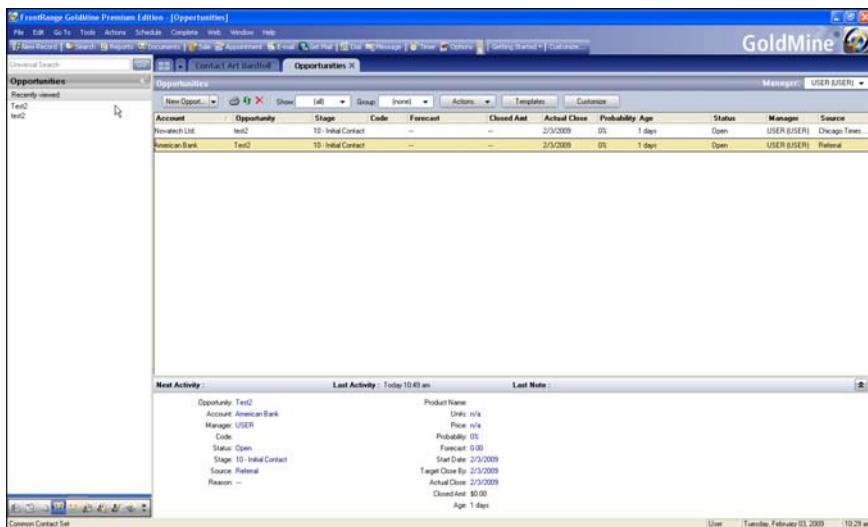
This window provides a history of recently viewed Opportunities and allows you to create, edit and maintain your Opportunities. For more information on Opportunities, see "Opportunity and Project Management" on page 267.

Projects
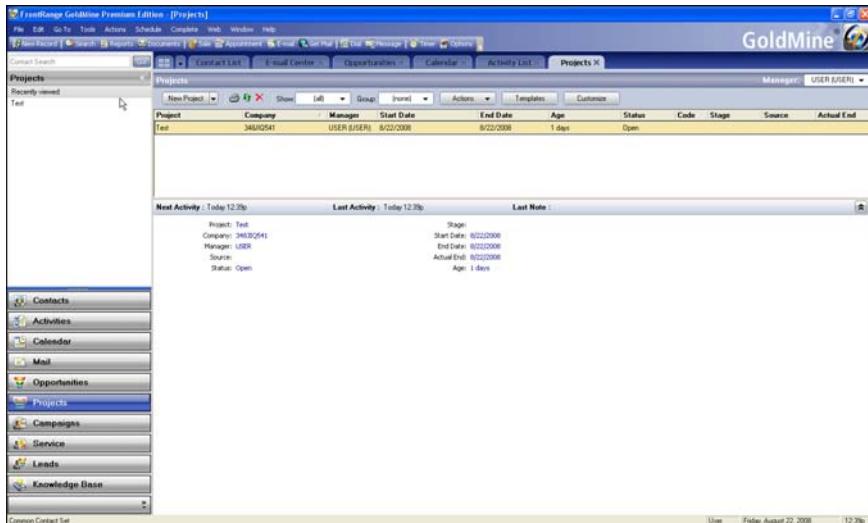
This window displays long-term projects to which a Contact record is linked. You can create or edit projects on this window. For more information and procedures to use Projects, see "Opportunity and Project Management" on page 267.

Campaigns

This window allows you to view customer interactions, from initial contact to closing the first sale to future purchases.

When you click on Campaigns, the first window that opens is a Welcome to the Campaign Management Center.
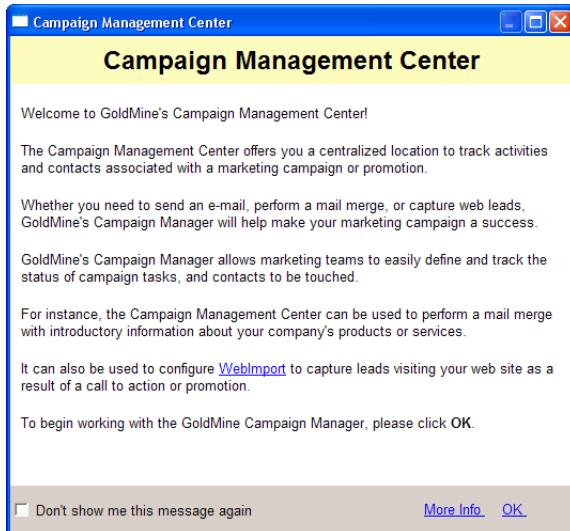
Click **OK** and the Campaign Management Center opens.
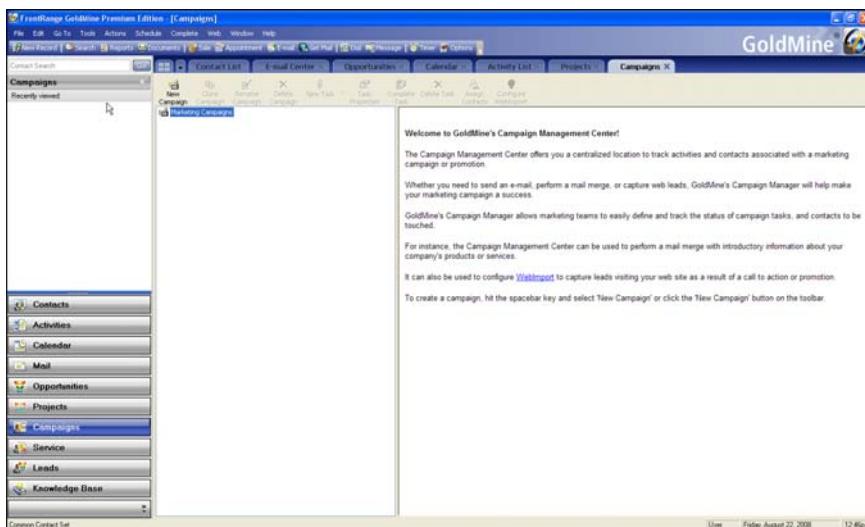
For more information and procedures for using Campaigns, see "Marketing Tools" on page 291.

Service Center
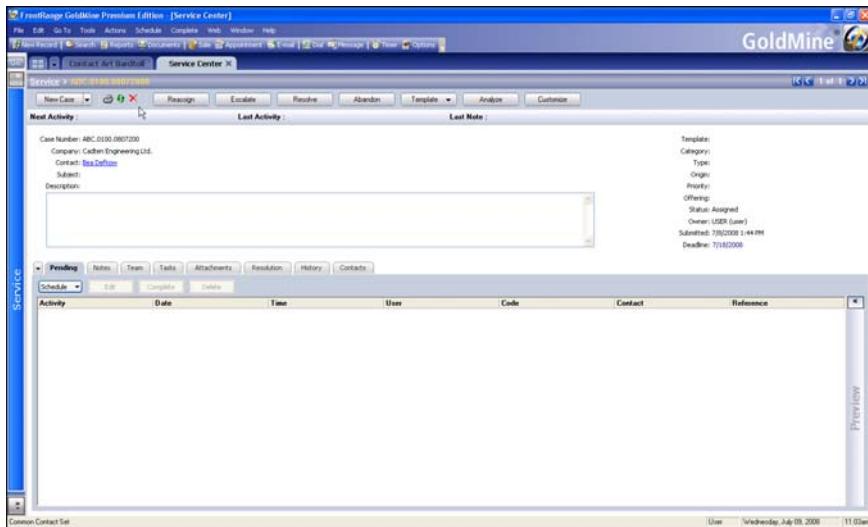
This window allows your service professionals to assign, escalate and resolve customer service requests. For more information on the Service Center, see "Using the Service Center" on page 304.

Leads
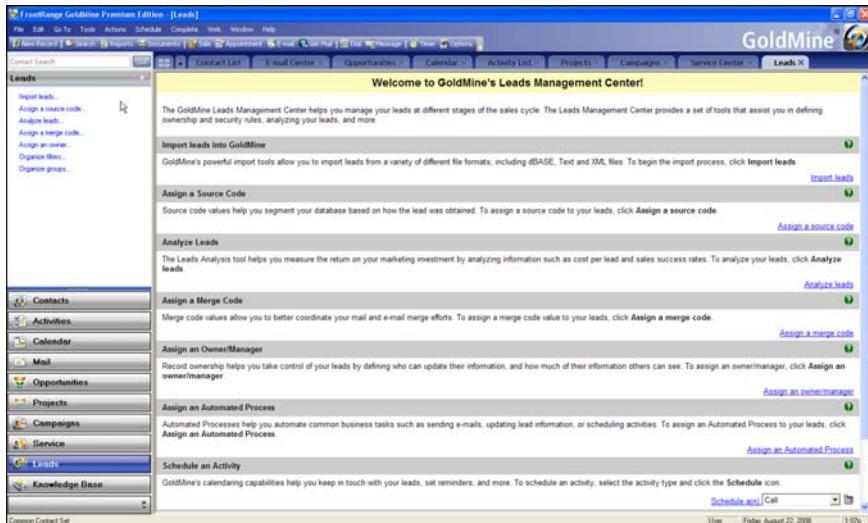
This window provides a sequence of activities to help manage marketing activities related to the base of contacts and potential leads. It provides a set of tools that assist you in defining leads. For more information on the Leads, see "Marketing Tools" on page 291.

Knowledge Base

This window provides a resource for maintaining any type of information useful to an organization or an individual.

When you click on Knowledge Base, the first window that opens is a Welcome to the Knowledge Base Center.
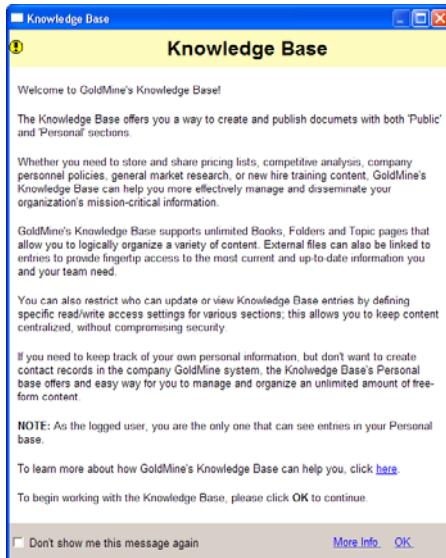
Click **OK** and the Knowledge Center opens.
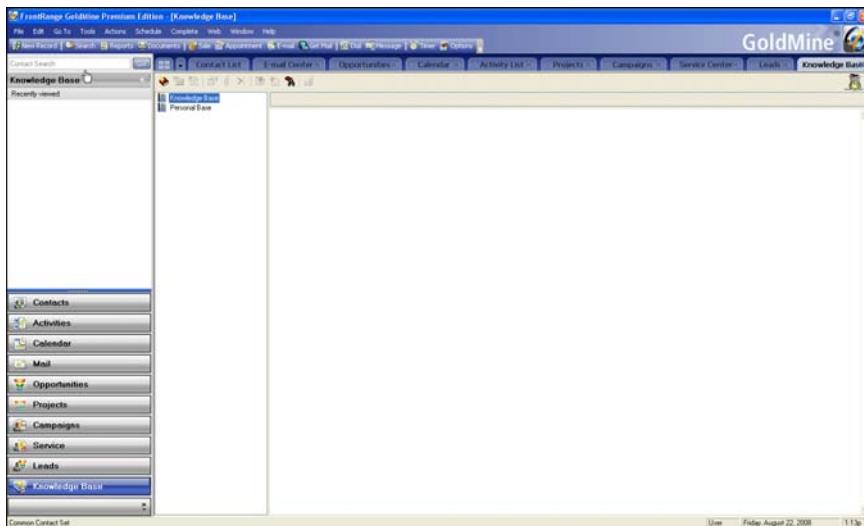
For more information and procedures for using the Knowledge Base Center, see "Knowledge Base" on page 319.

Global Toolbar

The Global Toolbar is located directly beneath the Main Menu. GoldMine Premier Edition installs default content.

This toolbar can be customized. For more information on using and editing the global toolbar, see "About Customizing Toolbars" on page 35.

Navigation Pane

The Navigation Pane is a new feature in GoldMine Premium Edition. The Navigation Pane offers additional viewing and navigation options, depending on the module selected.
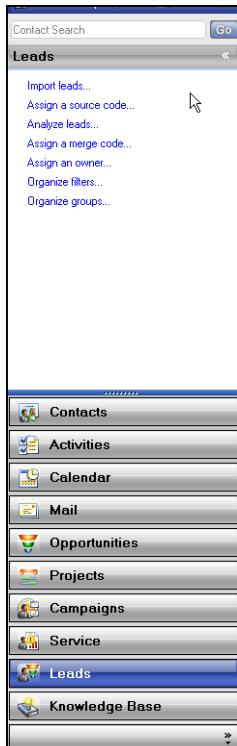
For more information on the Navigation pane, see "Navigation Pane" on page 33.

Status Bar

The bottom line of the window is called the status bar and contains:

| GoldMine Database | Num | Username | Wednesday, October 08, 2003 | 10:06am |
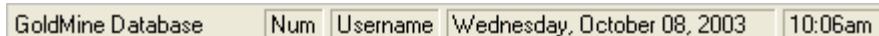
- The name of the open Contact Set on the left side. In the graphic above, it is GoldMine Database. However, the left side of the status bar also displays the help message for each toolbar button when the mouse is positioned on the button.

- The shift-state of [CAPS LOCK] and [NUM LOCK].

- The username for the logged in user.

- The date and time on the local computer.

Navigating GoldMine

Use the following options to navigate through GoldMine.

- **Navigating between open modules.** Press Ctrl+Tab.

- **Navigating within a module (between top panel and bottom tabs).** Each of the following navigation items is some combination of Ctrl-Tab, Tab and Arrow keys. These tools allow you to access every field and button shown on screen.

- **Navigating among the fields of a module.** Use Tab.

- **Navigating Primary sections within the currently open module.** Each module has unique features, but the following are examples of navigation:

  - **Moving around the Module-specific toolbar. Moving through the Grid (in Activity List, Contacts, and so on.)** Use Tab or Arrows.

  - **Moving around editable fields in a Contact record, and Custom screen if open.** Use Tab or Arrows

    The Tab order is defined in Field Properties. If one of the contact field is editable, Tab goes to the next field and make this field also editable.

- **Moving around editable fields in Case detail view.** Use Tab or Arrows.

  Tab should not be used to cycle between the tabs (for example, go from the Pending tab to the History tab).

- **Moving in the Context pane.** Use Tab, Arrows. Use Tab to move focus in or out of this area. Then use arrows to move up or down or side to side in the panel.

- **Moving in the Navigation panel.** Use Tab or Arrows

- **Moving around the top-level toolbars (excluding Menu bar).** Use Tab.

- **Moving in the Menu Bar.** Use Alt.

- **Scrolling between contact record tabs (Pending, History and so on.)** Use Ctrl.

About Customizing Toolbars

GoldMine allows you to create custom toolbars. You can also add, remove, rearrange or rename buttons on existing toolbars.

Editing Toolbar Options

The Global toolbar appears below the main toolbar. You can customize this toolbar by adding, removing or rearranging the buttons that appear on it. You can also create additional toolbars. Use the following procedure to create a custom toolbar.

1. Right-click in the empty space by the toolbar and from the pop-up menu, select **Customize.**

2. Click **New** and type the name of the new toolbar in the **New Toolbar** pop-up box.

    The new toolbar name appears in the Customize dialog box.

    If you cannot find your new toolbar right away, right click in the empty space by the toolbar to bring up the popup menu with the names of the available toolbars. Click the new toolbar name you created and the toolbar appears.

3. With the **Customize** dialog box still open, hold down **Ctrl** and then drag and drop the menu items you want to appear as buttons on your new toolbar.

   For example, if you want User Groups on your new toolbar, click and hold down Ctrl, then go to **Tools>User Groups** and then drag **User Groups** to the new toolbar.

4. Close the **Customize** dialog box.

Renaming a toolbar

1. Right-click in the empty space by the toolbar and from the pop-up menu, select **Customize.**

2. Select the toolbar you want to rename and click Rename.

3. Type in the new name in the dialog box.

4. Close the Customize dialog box.

Renaming or editing or deleting a button on a toolbar

1. Right-click in the empty space by the toolbar and from the pop-up menu, select **Customize.**

2. Select the toolbar on which the button you want to rename appears.

3. With the **Customize** dialog box still open, right-click on the button you want to rename.

4. At the pop-up menu, at the **Name** field, type in the new button name.

   The new button name appears on the toolbar.

5. Use the pop-up menu to edit or delete an existing button.

6. Close the **Customize** dialog box.

To rearrange buttons on a toolbar

Drag and drop the buttons to the desired configuration.

Navigation Panel

The Navigation Pane is a new feature in GoldMine Premium Edition. Essentially mirroring the Go To menu, the Navigation Pane also offers additional viewing and navigation options, depending on the module selected.
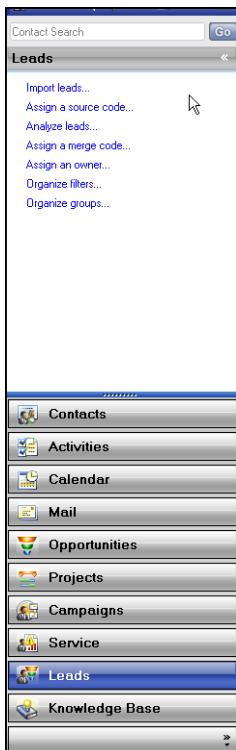
The Navigation Pane contains five sections:

Search Field. Type in search criteria and click **Go**. The Contact Search Center opens in the work area.

Title Bar. Displays the title for the currently selected module. Click the Title Bar to minimize or maximize the Navigation Pane.

View Window. Displays context-sensitive navigable history data, file browser, or calendar, depending on the module selected.

View buttons. Each button displays the main window for its corresponding module. For example, clicking Contacts opens the Contacts list view.

Using Online Help

View documentation using the extensive online Help system. Access overviews, step-by-step instructions, tips, notes, descriptions, and reference material while you work.

To implement window-level Help, click inside the dialog box and press **F1.**

NOTE: GoldMine requires Internet Explorer 6.0 or 7.0

Shortcut Keys

GoldMine menu commands can be executed with shortcut keys. Rather than using the mouse to select menu options, the shortcut keys are keyboard keys (F1) or key combinations (such as CTRL+P) that invoke a particular command.

This section provides tables of shortcut keys in both GoldMine and Microsoft Windows.

GoldMine Shortcut Keys

Menu Command	Key
Display online help for the active window	F1
Display context-sensitive help	Shift+F1
Display predefined field entries for lookups, calendar (date fields), or clock (time fields)	F2
Display the Contact Search Center	F4
Display the E-mail Center	F5
Display the Activity List	F6
Display your Calendar	F7
Display the Opportunity Manager	F9
Launch Campaign Manager	F10
Close the active window or module	Ctrl+F4
Exit GoldMine	Alt+F4
Find next	F3
Move to the next open module	Ctrl+Tab
Move to previous module	Ctrl+Shift+Tab
Move to Search box	Ctrl
Move to recent panel	Ctrl+3
Move to first Contact field	Ctrl+1

Contact Record Shortcut Keys

Menu Command	Key
Search for a string within the active tab	F3
Display predefined field entries for lookups, calendar (date fields), or clock (time fields)	F2
Dial the Phone2 telephone number for the Contact	Alt+2
Dial the Phone3 telephone number for the Contact	Alt+3
Undo typing in Notes	Ctrl+Z
Cut selected text in Notes	Ctrl+X
Copy selected text in Notes	Ctrl+C
Paste copied text in Notes	Ctrl+V

Menu Command	Key
Go to the next Contact record	Page Down
Go to the previous Contact record	Page Up
Go to the first record	Ctrl+Page Up
Go to the last record	Ctrl+Page Down
Cycle through last-viewed records	Shift+Page Up
Write an e-mail message to Contact	Ctrl+Shift+E
Dial the Phone1 telephone number for the Contact	Alt+1
Dial Fax for the Contact	Alt+4
View the Summary tab	Ctrl+S
View the Fields tab	Ctrl+F
View the Notes tab	Ctrl+N
View the Contacts tab for additional contacts	Ctrl+C
View the Details tab	Ctrl+D
View the Referrals tab	Ctrl+R
View the Pending tab	Ctrl+P
View the History tab	Ctrl+H
View the Links tab	Ctrl+L
View the Members tab	Ctrl+M
View the Processes tab	Ctrl+O
View the Opportunities tab	Ctrl+U
View the Projects tab	Ctrl+J
View the Cases Tab	Ctrl+A
View the GM+View Tab	Ctrl+V
Display Personal Contacts	F11
Start timer	F8
Stop timer	Shift+F8
Reset timer	Alt+F8
Restart timer	Ctrl+F8

Contact Tab Shortcut Keys

The following shortcut keys are the default values. You can rename any Contact tab shortcut and assign any shortcut to open this tab.GoldMine Reports

Menu Command	Key
View the Summary tab	Ctrl+S
View the Fields tab	Ctrl+F
View the Notes tab	Ctrl+N
View the Contact tab for additional contacts	Ctrl+C
View the Details tab	Ctrl+D
View the Referrals tab	Ctrl+R
View the Pending tab	Ctrl+P
View the History tab	Ctrl+H
View the Links tab	Ctrl+L
View the Members tab	Ctrl+M
View the Processes tab	Ctrl+O
View the Opportunities tab	Ctrl+U
View the Projects tab	Ctrl+J
View the Cases tab	Ctrl+A
View the GM+View tab	Ctrl+V

Shortcut Keys

Menu Command	Key
Cut the object	Ctrl+X
Copy the object	Ctrl+C
Paste the object	Ctrl+V
Delete the object	Delete
Change the font for the text	Alt+F10
Align the text within the object	Ctrl+P
Specify outline properties	Ctrl+O
Select a background	Ctrl+B
Edit a field expression	Ctrl+F
Insert a section label	F6
Insert a text label	F9
Insert data field	F2
Insert expression field	F3
Insert system field	F4
Insert dialog field	F5
Insert line	Ctrl+F9
Insert picture from clipboard	Alt+F7
Insert picture from disk file	Alt+F8
Create a dialog field	Ctrl+R
Edit a dialog field	Ctrl+M
Delete a dialog field	Ctrl+D
Define margins, ruler, and date format	F7
Define a filter	Ctrl+F7
Save or update report template	F10
Save template with a new file name	Shift+F10

Tree View Shortcuts

Menu Command	Key
Display all sub-items under the selected item	* (Asterisk) on the Numeric pad
Display the sub-items directly under the selected item	+ (Plus sign) on the Numeric pad
Collapse the items directly under the selected item	- (Minus sign) on the Numeric pad
Collapse the current selection if it is expanded and move the focus to the group leaf root	<- (Left arrow)
Display the sub-items directly under the selected item if it is collapsed	-> (Right arrow)
View the previous group	Alt+Left arrow
View the next group	Alt+Right arrow
Scroll the view without change of the selection	Ctrl+Up arrow
Scroll the view without change of the selection	Ctrl+Down arrow
Move the selection to the item matching the prefix letters in the beginning of a label	Any printable key

Combo Box Shortcuts

Menu Command	Key
Display the items in the active drop-down list or combo box	F4+Alt+Up Arrow
Hide the items in the active drop-down list or combo box	F4+Alt+Down Arrow

Search Box Shortcuts

Menu Command	Key
Select the Search box.	Ctrl+E
Enter Search for entered term using local search	Alt+. (Period)
Enter Search for entered term using Internet browser	Shift+. (Period)
Launch a program elevated if used from the Start Menu	Ctrl+Shift+Enter

Edit Box Shortcuts

Menu Command	Key
Move the insertion point to the beginning of the next word.	Ctrl+Right arrow
Move the insertion point to the beginning of the previous word.	Ctrl+Left arrow
Select a block of text.	Ctrl+Shift with any of the arrow keys
Move the selected item up	Alt+Shift+Up arrow
Move the selected item down	Alt+Shift+Down arrow
Scroll the view without change of the selection	Ctrl+Down arrow
Move the selection to the item matching the prefix letters in the beginning of a label	Any printable key

Other Control Shortcuts

Menu Command	Key
Display the items in the active drop-down list or combo box	F4+Alt+Up Arrow
Hide the items in the active drop-down list or combo box	F4+Alt+Down Arrow
Down Cycle through the Tab controls	Ctrl+Tab, Ctrl+Page
Reverse cycle through the Tab controls	Ctrl+Shift+Tab, Ctrl+Page Up
Move the insertion point to the beginning of the next word.	Ctrl+Right arrow
Move the insertion point to the beginning of the previous word.	Ctrl+Left arrow
Select a block of text.	Ctrl+Shift with any of the arrow keys
Move the selected item up	Alt+Shift+Up arrow
Move the selected item down	Alt+Shift+Down arrow

Navigation Shortcuts

Menu Command	Key
Close the active window or program	Alt+F4
Close the active document in programs that allow you to have multiple documents open	Ctrl+F4
Moves to next pane or palette within a program	Ctrl+Tab
Moves to previous pane or palette within a program	Ctrl+Shift+Tab
Moves to next window in a group of related windows (or between MDI document windows)	Ctrl+F6
Moves to previous window in a group of related windows (or between MDI document windows)	Ctrl+Shift+F6

Microsoft Windows Shortcuts

The following shortcuts are reserved for use by Microsoft Windows.

Menu Command	Key
Activate or inactivate the menu bar	Alt
Cycle through items in the order they were opened.	Alt+Esc
Cycle through items in the reverse order they were opened	Alt+Shift+Esc
Display shortcut menu for the active child window (multiple-document interface [MDI] application)	Alt+hyphen
Display the shortcut menu for the selected item.	Application
Copy the entire screen image to the clipboard.	Print Screen
Copy the active window image to the clipboard.	Alt+Print Screen
Display the system menu for the active window	Alt+spacebar
Cycle through open primary windows	Alt+Tab
Reverse cycle through open primary windows.	Alt+Shift+Tab
Cycle through open primary windows without closing the menu.	Ctrl+Alt+Tab
Reverse cycle through open primary windows without closing the menu.	Ctrl+Alt+Shift+Tab
Display the Start menu	Ctrl+Esc
Start Task Manager	Ctrl+Shift+Esc

Menu Command	Key
Display the Windows security screen	Ctrl+Alt+Delete

Microsoft Windows Explorer® Shortcuts

Menu Command	Key
Search for a file or folder	F3 or Ctrl+F
Display the Address bar list	F4
Select the Address bar	Alt+D
View the folder one level up	Alt+Up arrow
Go back to previous location viewed	Alt+Left arrow or Backspace
Go forward to next location in viewed	Alt+Right arrow
Close the active item, or exit the active program.	Alt+F4 or Ctrl+W
Delete the selected item and move it to the Recycle Bin	Ctrl+D or Delete
Delete the selected item without moving it to the Recycle Bin	Shift+Delete
Open the current location in a new window	Ctrl+N
Create shortcut to selected item	Ctrl+Shift while dragging an item
Switch input languages or keyboard layouts (Available and configurable when the user has installed multiple keyboard layouts.)	Left Alt+Shift
Switch keyboard layouts or input languages (Available and configurable when the user installed multiple keyboard layouts.).	Ctrl+Shift
Shortcut key for input languages (Available and configurable when the user installed multiple keyboard layouts.)	Ctrl or left Alt+Shift+~, number (0~9), or grave accent key
Cancel the current task or search	Esc

Favorites Center Shortcuts

Menu Command	Key
Organize Favorites	Ctrl+B
Add current page to Favorites	Ctrl+D
Open History	Ctrl+H
Open History in pinned mode	Ctrl+Shift+H
Open Favorites	Ctrl+I
Open Favorites in pinned mode	Ctrl+Shift+I
Open Feeds.	Ctrl+J
Open Feeds in pinned mode	Ctrl+Shift+J

Tab Shortcuts

Menu Command	Key
Open a link in new background tab	Ctrl+Left mouse button
Open a link in new foreground tab	Ctrl+Shift+Left mouse button
Close tab (closes window if only one tab is open)	Ctrl+F4, Ctrl+W
Open Quick Tab view	Ctrl+Q
Open a new Tab	Ctrl+T
View the list of the open Tabs	Ctrl+Shift+Q
Switch to next tab	Ctrl+Tab
Switch to previous tab	Ctrl+Shift+Tab

Address Bar Shortcuts

Menu Command	Key
View the list of previously typed addresses	F4
Select the Address bar	Alt+D
Open the Web site address that is typed in the Address bar in new tab	Alt+Enter
Add *http://www* to the beginning of text and *.com* to the end of text in Address bar	Ctrl+Enter
Add *http://www.* to the beginning of text and the Web site address suffix you have specified to the end of text in the Address bar	Ctrl+Shift+Enter
Switch to the previous tab	Ctrl+Shift+Tab

Search Bar Shortcuts

Menu Command	Key
Open search results in new tab	Alt+Enter
View list of search providers	Ctrl+Down arrow

Logging Away from GoldMine

If you need to leave your desk for a period of time, post information about your current location and the time and date of your expected return using the following procedure.

Use the following procedure to log away from GoldMine.

1. Select **File>>Log Away.**

    The **I'm away from my desk dialog box (Peg Board)** opens.
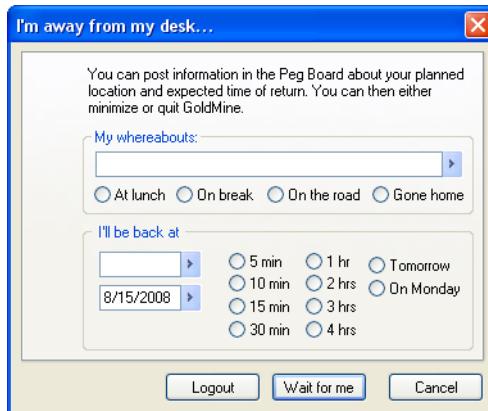
2. In the **My Whereabouts** field, do one of the following:

   • Type where you have gone in the text box

   • Right-click in the field and select an item from the F2 Lookup list.

   • Select one of the radio button options below the text box to select:

      • At lunch

      • On break

      • On the road

      • Gone home

3. In the **I'll be back at area,** select the time you will return from the drop-down list, or select a time period using the radio buttons to the right.

   Select the day for the day options (Tomorrow or On Monday) or select the date from the F2 graphical calendar on the second text box.

4. Select an option:

   • **Logout.** This option posts the time of logout in the Peg Board.

   • **Wait for me.** This option minimizes GoldMine. Although you are not logged out of GoldMine, you are prompted for your password to restore the display. After returning to your work session, GoldMine automatically clears the reference in the Whereabouts column of the Peg Board.

   • **Cancel.** This option cancels the action.

Logging in as Another User

Use the following procedure to log into GoldMine as another user.

1.   Select **File>>Switch User.**
2.   GoldMine closes and a new login splash screen immediately appears.
3.   Type in the **Username** and **Password** of the new user.
4.   Click **OK** to log in as that user.

Viewing GoldMine Information

View summary information, credits, installation details, or contact information for FrontRange Solutions.

Use the following procedure to view GoldMine information.

1.   Select **Help>>About GoldMine**.

     The **About GoldMine** window opens.

2.   View the version, registered owner, product serial number, and copyright information. Click the following buttons to access information for:

     •   **Credits.** Displays integrated applications.
     •   **FrontRange.** Displays contact information for FrontRange Solutions.
     •   **System.** Displays information about your GoldMine installation. To copy the information, click **Copy All**. Paste the information into your outside application.

3.   Click **OK**.

Local Menus

Use a local menu (shortcut menu) to access commands effecting options or information in the selected browse window, tab, or pane.

Use the following procedure to access local menus.

1. Right-click in the window, tab, or pane you are working in. For example, if you are working on the Pending tab, the following local menu opens:

Schedule	▶
Zoom...	
Complete...	
Reply...	
Options	▶
Find...	
Output to	▶
Delete...	
Edit...	

2. Select the action from the menu.

QuickStart Wizard

The **QuickStart Wizard** allows you to access and configure basic operations and tools to work with GoldMine.

The QuickStart Wizard contains a set of individual wizards you access in one central location to ensure you configure key operations:

- **User information.** Configures personal information for users such as name and title. See "Using the User Information QuickStart Wizard" on page 55.

- **User.** Configures general user data and security settings such as the individual's GoldMine user name and password and QuickStart Wizard access rights. See "Using the User QuickStart Wizard" on page 58.

> **NOTE:** Contact your administrator before using this wizard.

- **Industry Templates.** Configures Industry Solutions templates and GoldMine PLUS applications. See "Using the Industry Templates Quick Wizard" on page 61.

- **Key Fields.** Configures the key field labels to store data for your business. See "Using the Key Fields QuickStart Wizard" on page 65

- **Postal Codes.** Configures the process to import postal codes into GoldMine. See "Using the Postal Codes QuickStart Wizard" on page 67

- **Data Import.** Configures the process to import contact data from another contact management application into GoldMine. See "Using the Data Import QuickStart Wizard" on page 68.

- **GoldMine PLUS.** Configures GoldMine's links to document applications including Microsoft Word and Adobe Acrobat. See "Using the GoldMine PLUS QuickStart Wizard" on page 72.

The QuickStart Wizard appears immediately after installing GoldMine to help set up the critical operations most users need immediately such as e-mail accounts. Use the QuickStart Wizard after installation to add or change basic configuration settings by selecting **Tools>>QuickStart Wizard.**

Users without Master Rights have access to the User Information Wizard and Document Management Wizard.

Using the User Information QuickStart Wizard

Configure or update individual user's personal information stored in the Personal tab of the User's Options.

Use the following procedure to configure user information with the User Information wizard.

1. Select **Tools>>Quick Start Wizard.**

2. At the GoldMine QuickStart Wizard dialog box, click the **User Information Wizard** button.
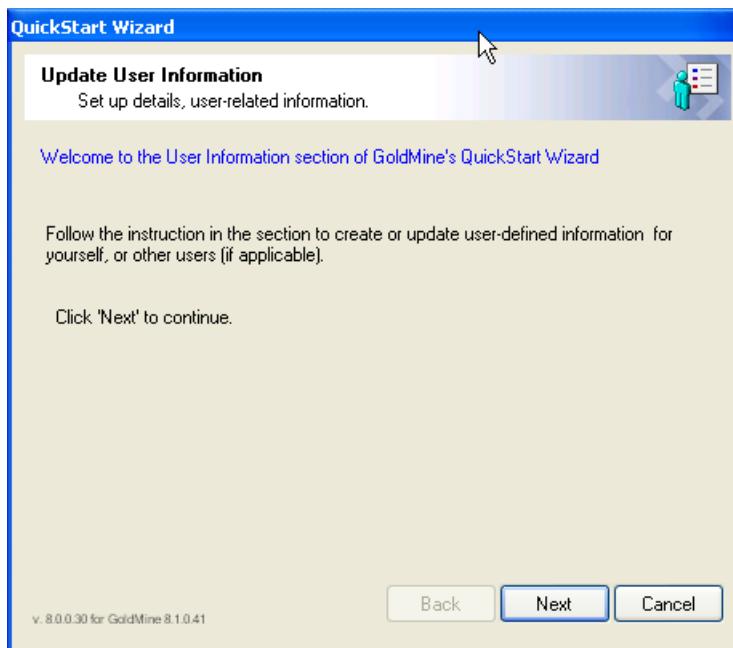
3. The Welcome screen of the **Q**uickStart Wizard: User Information dialog box appears. Click **Next.**
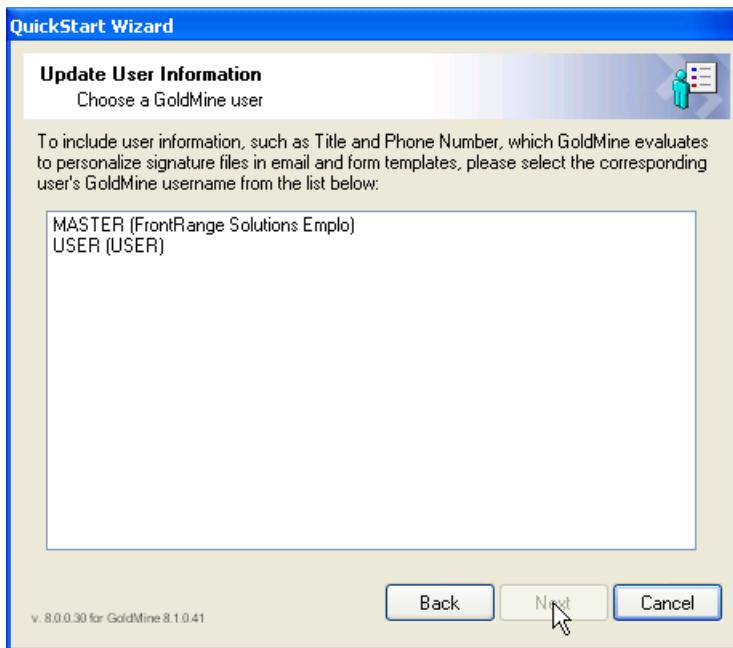
4. At the user list, select the user for which you are updating personal information and then click **Next.**
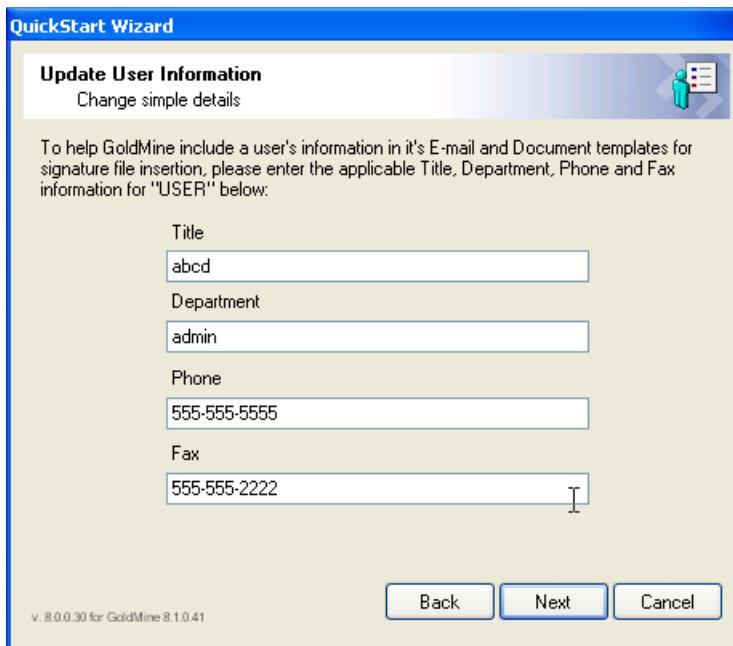
5. Update the following fields as needed:

- **Title.** Type the appropriate title or salutation such as Ms., Dr., and so on.
- **Department.** Type the user's organizational unit such as Marketing.
- **Phone.** Type the user's primary telephone number.
- **Fax.** Type the user's fax number.

Click **Next.**

The user variable options open. These variables supplement basic information stored in the Personal tab.
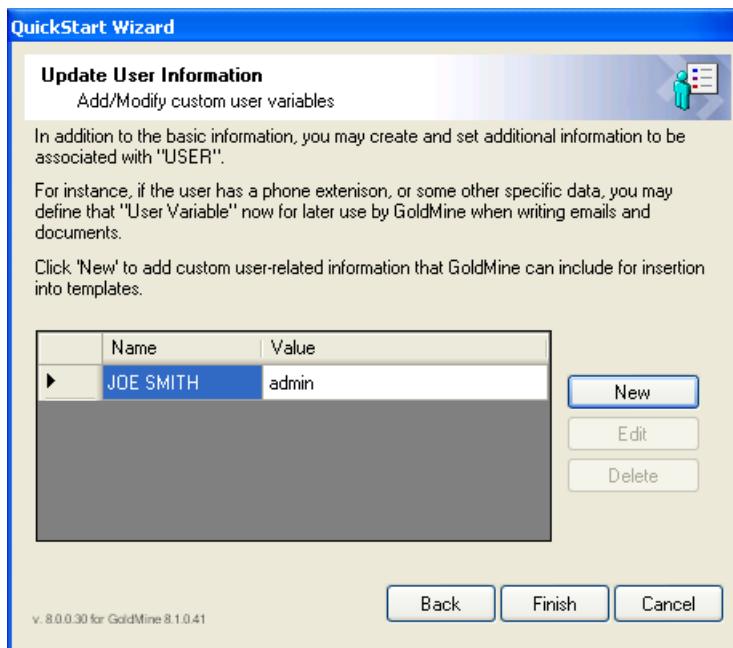
6. To add or change a variable, click **New** or **Edit.**

The Add a New Variable or Edit a Variable dialog box opens.
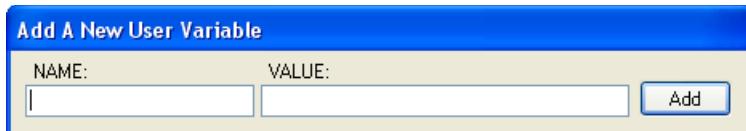
- In the **Name** field, type the new variable such as *Cell Phone*.
- In the **Value** text box, type the value of the variable such as the *cell phone number.*
- To remove a variable, highlight the variable and click **Delete.**
- Click **Add** or **OK** to close the Add or Edit Variable dialog box and return to the User Information Wizard.

7. Click **Finish** to close the User Information Wizard and return to the QuickStart Wizard dialog box.

Using the User QuickStart Wizard

Use this wizard to create and update users and their settings. The created or updated users are available in the Users' Master File (select **Tools>>Configure>>Users' Settings**).

Use the following procedure to configure users with the User wizard.

NOTE: Contact your administrator before using this wizard.

1. Select **Tools>>Quick Start Wizard.**

2. At the GoldMine QuickStart Wizard dialog box, click the **User Wizard** button.
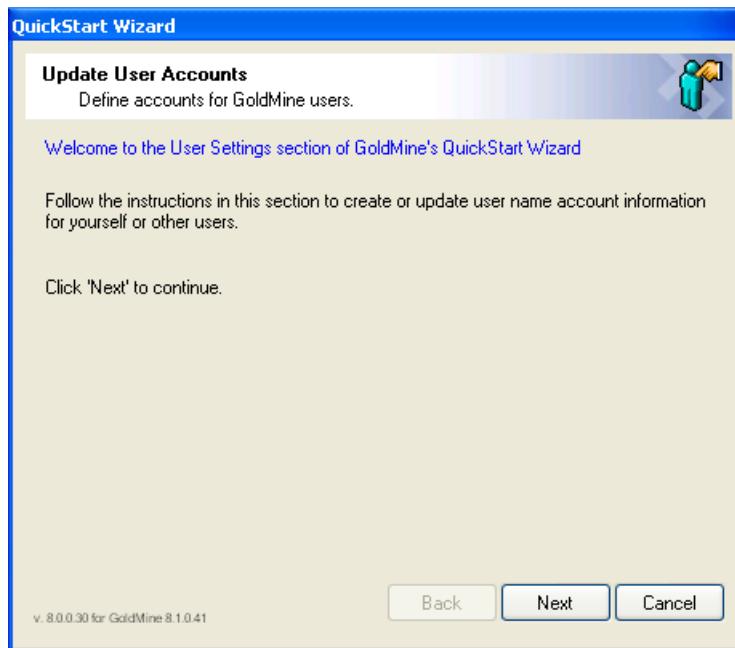
3. The Welcome screen of the QuickStart Wizard: User Settings dialog box opens. Click **Next.**
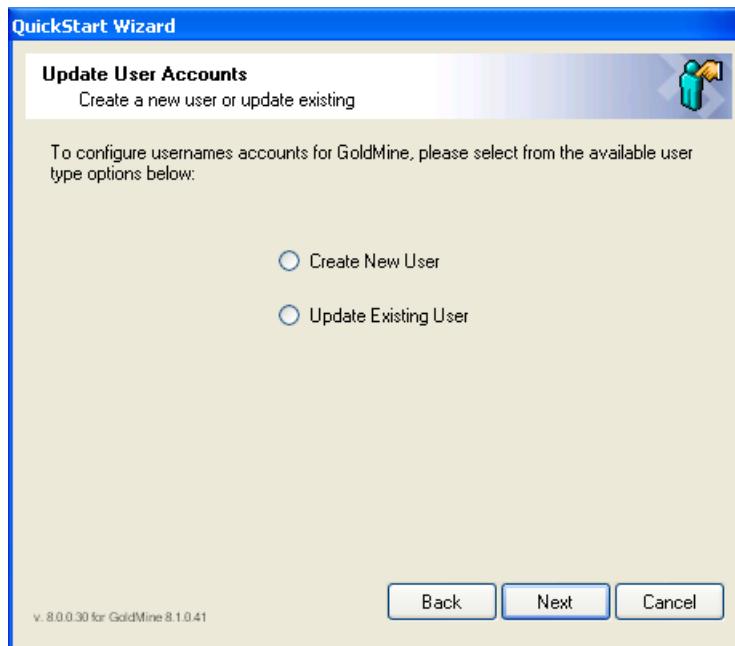
4. At the Username accounts dialog box, select either:

- **Create New User.** Create a new user.
- **Update Existing User.** Select the name of the user you are editing in the drop-down list.

Click **Next.**
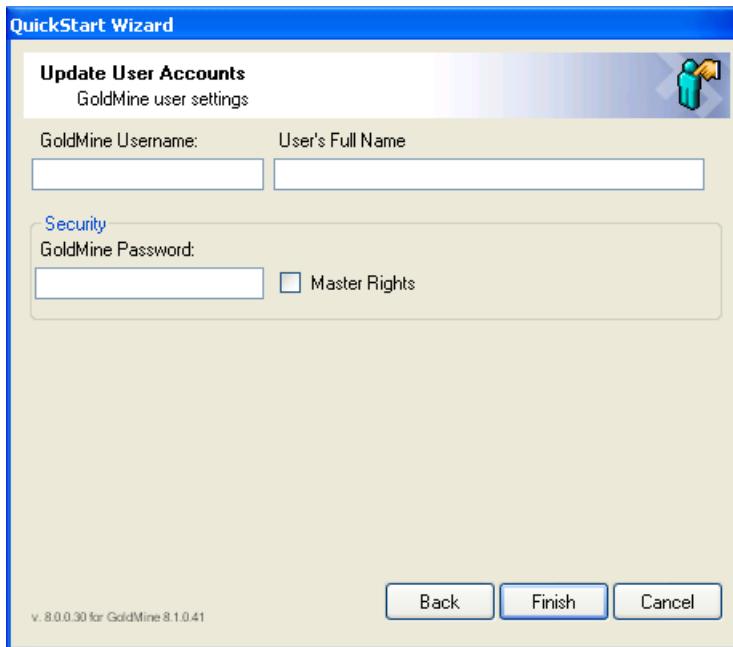
5. Complete these fields to create or modify the user settings:

- **GoldMine Username.** If creating a new user, type the user name (up to 8 characters) in the text box.
- **User's Full Name.** Type the first, middle, and last name, as appropriate for your company.
- **GoldMine Password.** Type a password the user uses when logging into GoldMine.

  The user may change the password on the **Persona**l tab of the **Users' Options** dialog box.

- Select **Master Rights** if you are granting the user unrestricted access to GoldMine features and settings except other users' Personal Contacts and PersonalBase in the InfoCenter.

> **NOTE:** Only GoldMine administrators or other authorized individuals should have Master Rights.

6. Click **Finish.**

A Quick Wizard message box that acknowledges the user update is successful.

Using the Industry Templates Quick Wizard

Use the following procedure to use this wizard to configure Industry Solutions templates and GoldMine PLUS applications.

1. Select **Tools>>Quick Start Wizard.**

2. At the GoldMine QuickStart Wizard dialog box, click the **Industry Templates Wizard** button.

3. The Welcome screen of the QuickStart Wizard: Industry Templates dialog box opens. Select one of the Industry Solution templates:
   - Financial Services
   - iMarket
   - Insurance (Life)
   - Insurance (Property and Casualty)
   - Legal Services
   - Mortgage Lending
   - Non-Profits Organizations
   - Real Estate (Commercial)
   - Real Estate (Residential)
4. Click **Next.**

5. At the GoldMine Template Installer dialog box, read and follow the text. Be sure to back your work up before going to the next step. Click **Next.**
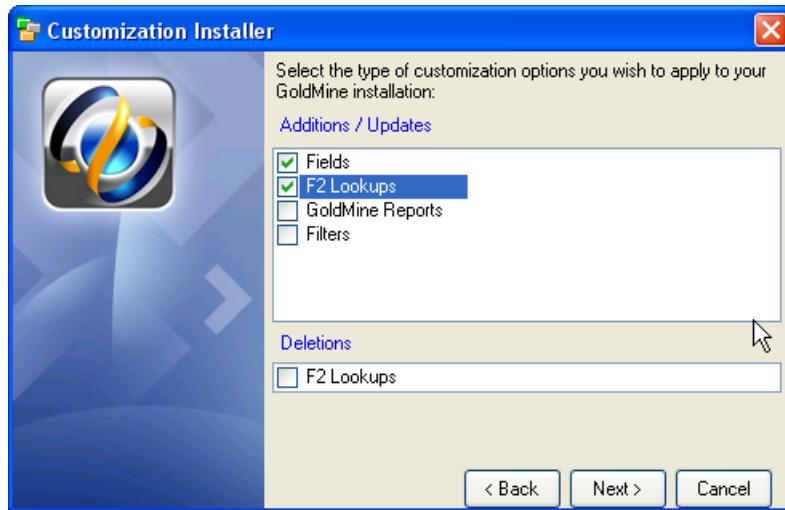
6. Select the customization options.
   • At the **Additions/Update** field, select the options you want to install.
   • At the **Deletion** field, select the options you want to delete.
   Click **Next.**
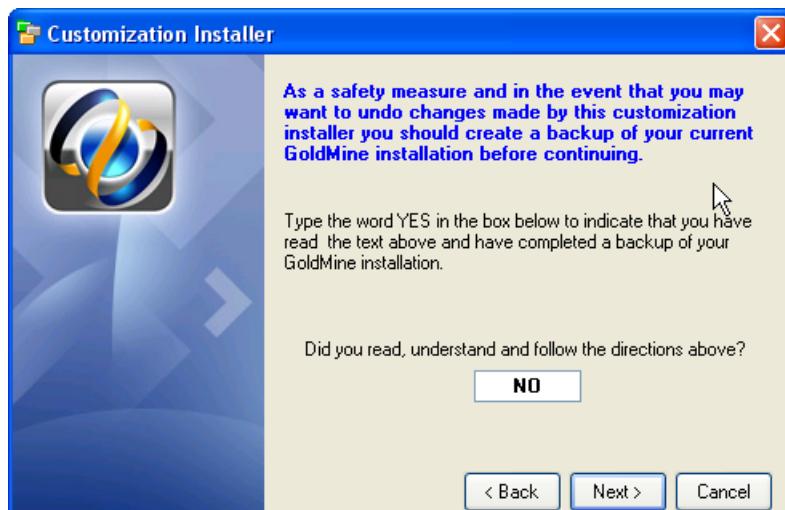
7. Read the screen text and the type in **Yes** over the No default.

   This text explains that you cannot undo the customization. A dialog box appears stating you must be logged in as a Master Rights user to install an Industry Solution template.

8. Click **Next.**
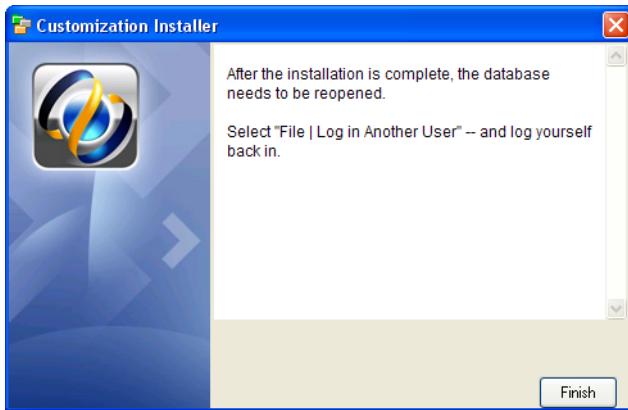
9. Click **Finish** to being the installation.

10. When the installation is complete, a message appears that states the fields are updated and need to be rebuilt.
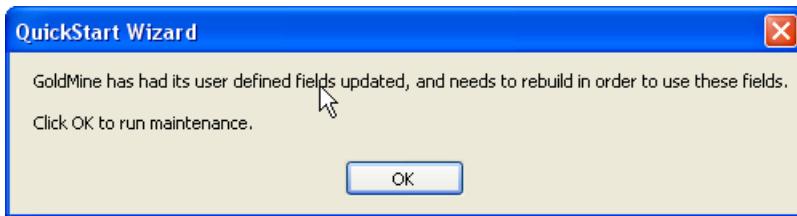
11. Click **OK.**

To see the changes, rebuild the database, log out, and log in to GoldMine.

Using the Key Fields QuickStart Wizard

GoldMine indexes the five Key fields, making them excellent fields for data you retrieve or filter on often. Assign field labels using this wizard.

Use the following procedure to configure key field customization with the Key Fields wizard.

1. Select **Tools>>Quick Start Wizard.**

2. At the GoldMine QuickStart Wizard dialog box, click the **Key Fields Wizard** ![button] button.

   The Welcome screen of the QuickStart Wizard: Key Fields Customization dialog box opens.

3. Click **Next.**
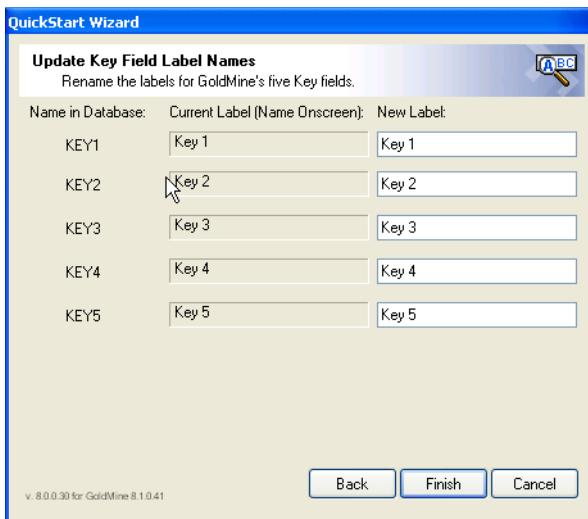
4. At the Update Key Field Label Names dialog box:

In the **Name in Database** column the field names, **Key1** through **Key5,** are listed.

- The **Current Label** column displays the current field name.
- In the **New Label** field, type the necessary changes for each field names.

The Current Label corresponds to the local label for the field. If the field does not have a local label, the Current Label column displays the global label.

5. Click **Finish.**

6. At the GoldMine message, click **Yes.**

To see the updated Key field labels, log out of GoldMine and back in.

Using the Postal Codes QuickStart Wizard

You can import over 42,000 United States Postal Codes into your lookup table. Use the following procedure to import postal codes into GoldMine using the Postal Codes wizard.

1. Select **Tools>>Quick Start Wizard.**

2. At the GoldMine QuickStart Wizard dialog box, click the **Key Fields Wizard** button.

3. The **Postal Code Import** dialog box opens.
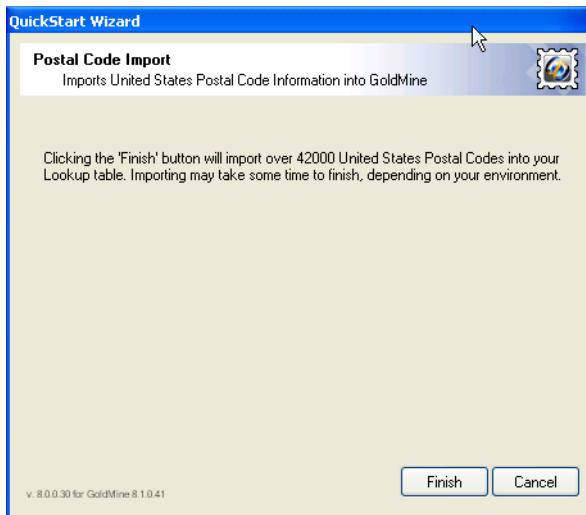
4. Click **Finish** to import all United States Postal Codes into your lookup table. The import process may take considerable time, depending on your environment.

Using the Data Import QuickStart Wizard

Import data from other contact management applications into GoldMine, eliminating data entry. Incorporate new data into GoldMine and begin using it.

NOTE: This wizard is available for users with Master Rights only.

1. Select **Tools>>Quick Start Wizard.**
2. At the GoldMine QuickStart Wizard dialog box, click the **Data Import Wizard** button.

    The Welcome screen of the **Data Import Wizard** dialog box opens.
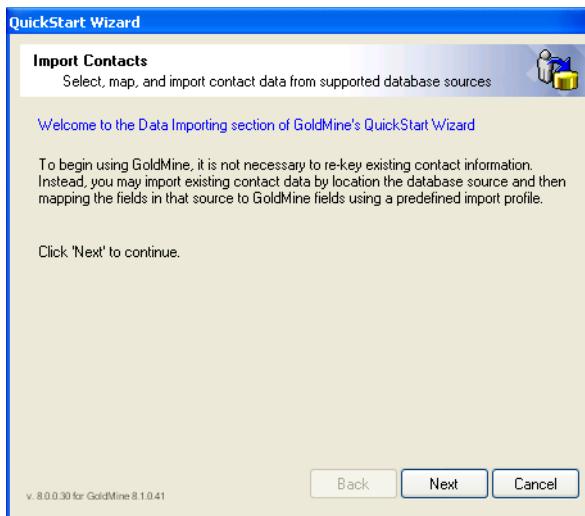
3. Click **Next.**
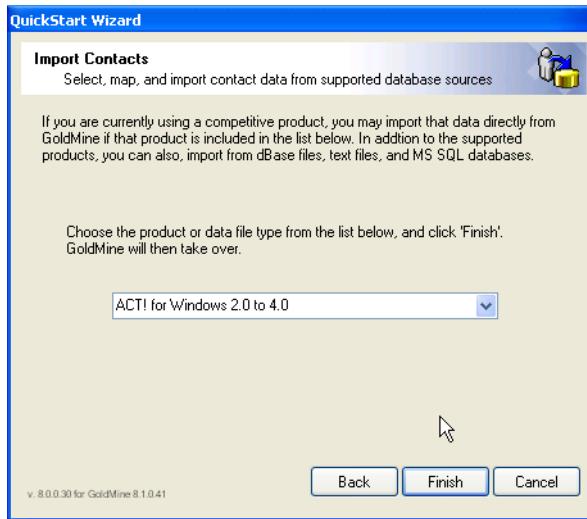
4. Select the contact management application you are importing from in the **Choose the product from which you are importing** drop-down list. Select one:

- ACT! for windows 2.0 through 4.0
- ACT! 6.0
- Lotus Organizer 6.0
- Microsoft Outlook 2003 and 2007
- Firebird or Microsoft SQL Server database table
- dBase files (*.DBF)
- Delimited text files (Comma, tab, etc.)
- Text files with fixed length fields

If importing from a source different from these options, use the import options in GoldMine. Select **File>>Import and Export>>Import contact records.**

5. Click **Finish.**

The Alert window opens.
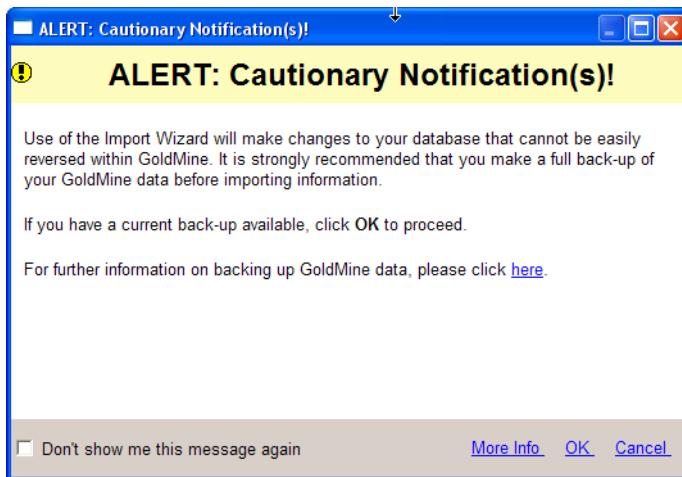
6. Click **OK.** The **Import Wizard** opens.

7. Make your selection and then click **Next**.
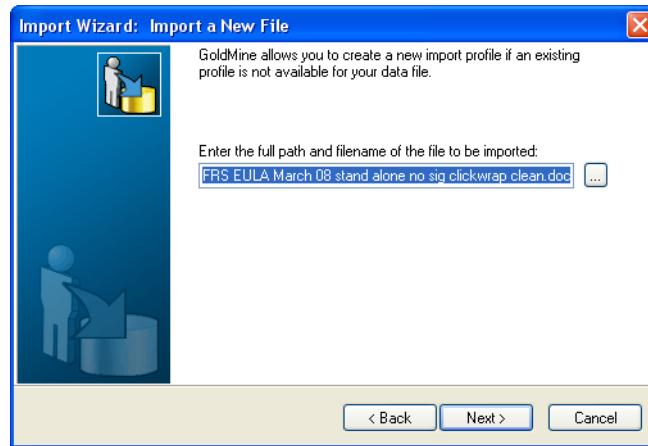
8. Enter the complete path and filename of the file to be exported in the field and click **Next**.

If you chose **SQL** the following screen opens.
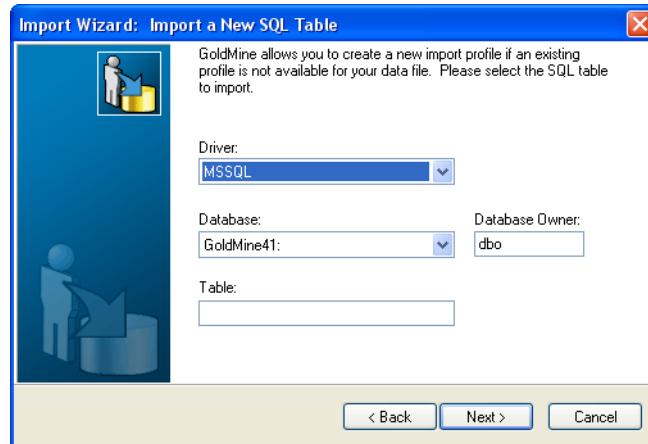
9. Complete the wizard screens and then click **Finish.**

Using the GoldMine PLUS QuickStart Wizard

Use this quick wizard links GoldMine Plus products to document applications including Microsoft Word and Adobe Acrobat.

Use the following procedure to import GoldMine PLUS data.

1. Select **Tools>>Quick Start Wizard.**

2. At the GoldMine QuickStart Wizard dialog box, click the **GoldMine PLUS** button.

   The FrontRange Support site page opens.

3. Log into FrontRange and move through the Support site.

Contact Management

About Contact Records

GoldMine uses the contact record (contact) as the core component to which all information is tied. When a contact is added to GoldMine's database, a contact record is created. It contains such basic information as name, address, and telephone information about a person or company you keep in contact with. The record's many fields record pertinent and updated information, always making the newest information available to GoldMine users working with the contact.

The default view for contact records is the **Contact List** view. Double-click on a contact to open that contact record.

The contact record has two basic sections:

- **Upper section.** Contains standard contact information such as name, address and telephone numbers, and five user-definable fields. This part of the screen is the primary contact information because it displays the company's name and the name of the company's primary contact. It is common to complete the rest of the contact record with information related to the primary contact of that company.

- **Lower part.** Organizes secondary information, such as Relationships, notes, pending activities, and history records, into Contact tabs storing information linked to the contact record. For contact tab information, see "About the Relationships Tab" on page 91.

Each record also has a set of associated customizable properties:

- **Record-related Settings.** Phone number format, record ownership, and alerts. For more information, see "About the Relationships Tab" on page 91.

- **Contact Details.** Occasions, free/busy, and digital IDs. For more information, see "Working with Contact Details" on page 90.

About Contact Record Tabs

The tab bar appears in the middle of a contact record. It contains a series of tab folders for organizing information related to the contact including Relationships, Details, Notes, GM+View, Pending, History, Opportunities, Projects and Cases.

To view the information on a tab:

- Select a tab from the default layout, or customize the tab layout by selecting from the pull-down menu at the right of the window.

  - **Shortcut key.** Type a shortcut key to launch the tab.
  - **Mouse.** If your layout includes more tabs than fit in the contact record window, click the drop-down arrow at the beginning of the row and select the tab from the menu.

A selected tab moves to the front and changes color. The lower part of the Record displays information specific to the tab. Use the scroll bars or resize the window to view all the information. Or change the displayed tabs based on User Options.

Tabs have local menus. Right-click to display. To apply a command to a listed record, select the record, then right-click to display the local menu.

Contact Record Tabs
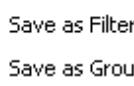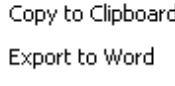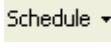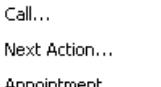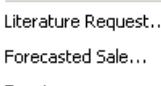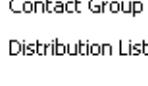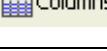
The following tabs are available in GoldMine:

- **Cases.** Shows the case information for a contact. See "Using the Service Center" on page 304.

- **Contacts.** Displays information about additional contacts.

- **Details.** Stores information about the contact, such as e-mail addresses, pager PIN, birthdays and so on. See "About the Details Tab" on page 94.

- **Field.** Displays information in the user-defined fields.

- **GM+View.** Creates a customizable information page using HTML capabilities.
- **History.** Stores completed scheduled/unscheduled activities for the contact. See "Scheduling Activities" on page 143.
- **Relationships.** Shows the graphic interface for a contact. For more information, see "About the Relationships Tab" on page 91.
- **Link.** Lists files linked to the contact. See "Linking Files to a Contact Record" on page 85.
- **Members.** Displays the contact Groups (Fixed set of contact records that meet an initial set of conditions. See "Groups" on page 128.
- **Notes.** Stores freeform information about the contact. See "About the Notes Tab" on page 98.
- **Opportunities.** Displays opportunities linked to the contact. See "Opportunity and Project Management" on page 267.
- **Pending.** Displays all activities scheduled for the contact. See "Scheduling Activities" on page 143.
- **Projects.** Displays long-term projects to which the contact is linked. See "Opportunity and Project Management" on page 267.
- **Processes.** Displays the Automated Processes attached to the contact.
- **Referrals.** Referrals create a link between two contact records in the database. See "About the Referrals Tab" on page 98.
- **Summary.** Displays activity information for the contact and the contact record. See "About the Summary Tab" on page 101.
- **Ticket.** Available when using GoldMine with an E-License, on an SQL database, and integrated with HEAT. For more information the Ticket tab, see the Ticket Transfer Utility with HEAT Integration section in the *GoldMine 8.5 Administrators Guide.*

Contact Search Center Toolbar

The Center toolbar changes to reflect the current action. Some options are available when creating or using a saved search.

![Save icon] ▾	Select from the drop-down menu:
Save as Filter Save as Group Copy to Clipboard Export to Word Export to Excel	Save search criteria as a Filter. Available only during an active search. Save search results as a Group. Available only during an active search. Copy the results of the current search to the clipboard. Export the results of the current search to a MicroSoft Word document. Export the results of the current search to a MicroSoft Excel document.
Print	Print the results of the current search.
Schedule ▾	Select **All Tagged Records** to schedule an activity for a group of contacts, or **Selected Contact** to schedule an activity for one contact. Select the activity type from the drop-down menu:
Call... Next Action... Appointment... To-do... Literature Request.. Forecasted Sale... Event...	Open the Schedule a Call dialog. Open the Schedule a Next Action dialog. Open the Schedule an Appointment dialog. Open the Schedule a To-do dialog. Open the Schedule a Literature Request dialog. Open the Schedule a Forecasted Sale dialog. Open the Schedule an Event dialog.
Merge ▾	Select from the drop-down menu:
Mail Merge E-mail Merge	Begin mail merge in the Mail Merge Properties (Printing) dialog. Begin an e-mail merge in the Mail Merge Properties (E-mail) dialog.
Add to ▾	Select from the drop-down menu.
Contact Group Distribution List	Add the selected Contact to a Contact Group. Add the selected Contact to a Distribution List.
Columns	Select a search option from the drop-down menu.

Default Search Query Editor	Display default search options only. Display a SQL Query Editor window underneath the default search options.
Prefs	Open the Lookup tab in User's Options.
Columns	Open the Browser Column Selection dialog.

About Creating Contact Records

Create contact records several ways:

- Create a new record for a new company.
- Create a new contact with a new relationship tree (organizational chart).
- Create a new contact based on a record type.

Creating a New Contact Record

Use the following procedure to create a new record for a new company.

Note that required fields display with a surrounding red box. If you do not enter data in a required field the Required Fields Alert dialog box opens.

1. Click **New Button** or navigate to **File>>New>>New Record.**

    The **New Record** dialog box opens.

2. At the **Record Type** dropdown box, select the type of contact you want to create from the pull-down menu.

    The set of record types available depends on the configuration of your GoldMine system.

    To create a new contact record with a new contact or company, select **[Plain contact record]**.

3. Click in the area right of each field name, and in the dropdown box select or type the information for the field.

- **Company.** Type in the name of the organization for this record.
- **Contact.** Type in the first name of the primary contact at the company.

NOTE: You must enter a value for either Company or Contact.

- **Last.** Type in the last name of the primary contact at the company.
- **Prefix.** Select the prefix (Mr., Mrs., and so on) of the primary contact at the company.
- **Dept.** Type in or select the Department designation of the primary contact at the company.
- **Title.** Type in or select the title designation, (Account Manager, Consultant and so on) of the primary contact at the company.
- **Source.** Type in or select the source of the contact, for example Phone book, newspaper, and so on.)
- **Record type.** Type in or select the type of record, for example EU Customer, Press, and so on.
- **Industry.** Type in or select the industry of the primary contact, for
- **Phone (1, 2, 3).** Type in the telephone number(s) for the primary contact.
- If you are entering international telephone numbers, click the **International Phone Format** checkbox.
    - If you leave this field blank, GoldMine applies United States and Canadian formatting to the telephone number. If you select this checkbox, telephone number are not formatted.
    - The International Format box is selected by default if the country setting in the WIN.INI is not the United States.
- **Fax.** Type in the Fax number for the primary contact.

- **E-mail Address.** Click the down arrow and complete the email internet email address for the contact. The email address stores in the Details tab and displays in the primary contact panes.

- **Web Site.** Type in or select the Web site associated with the contact or the company. A typical Web site address appears in the format http://www.something.com; for example, http://www.frontrange.com. GoldMine stores this address as a Details t

4. In the **Creation Method** area, select the desired options.

   - **Copy Current record.** Click on this option to use an existing contact record as a template for a new record to avoid having to type the same entries in primary fields. Click this checkbox to create a contact record with the primary field entries copied from the active record. The Contact, E-mail Address, Title, and Dept fields are not copied. To create a completely new Contact record, do not select this option.

   - **View in new window.** Click this checkbox to display the new record in a separate window appearing in front of the current contact record, which remains in your work area. The new record becomes the active record.

5. In the **Duplicate Checking** area, select the fields to be checked for duplicate data in other contact records. If GoldMine finds a match, you will receive a warning that the record already exists and it asks you whether to proceed.

   - **Company and Contact name.** Click on this checkbox to have GoldMine check the company and contact names and displays a warning if they already exist.

   - **Phone number.** Click on this checkbox to have GoldMine check the **Phone 1** field for existing records that have the same telephone number as the one entered for the new contact.

   - **E-mail.** Click on this checkbox to have GoldMine check the email address to see if it already exists.

6. Click **OK.**

Duplicate Warnings

GoldMine checks company names, contact names, phone numbers and emails for possible duplicates. If a duplicate exists, a warning appears.

Duplicate Company or Contact Names

If you create a new record and enter a company name or contact name that already exists for another record, the following dialog box opens.
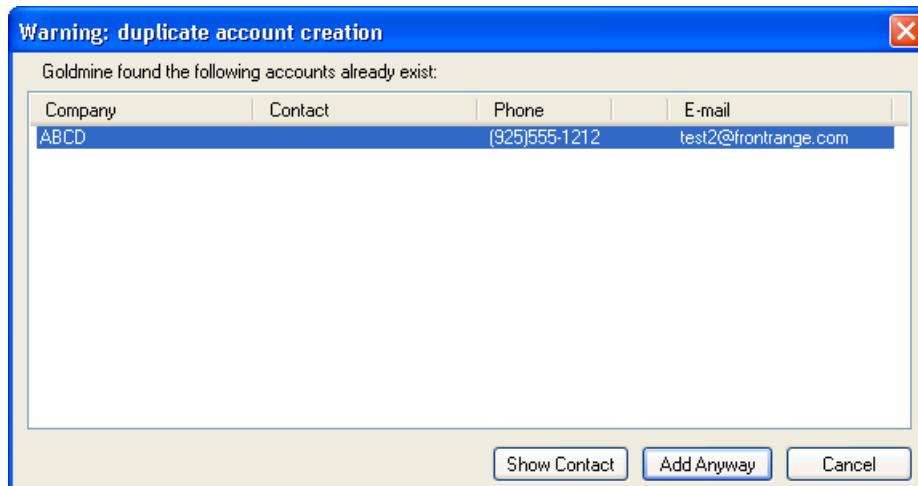
- Click **Show Contact** to see the record that contains the duplicate name.
- Click **Add Anyway** to add the record with the duplicate company or contact.

Duplicate Phone Numbers

If you create a new record and enter a phone number that already exists for another record, the following dialog box opens.
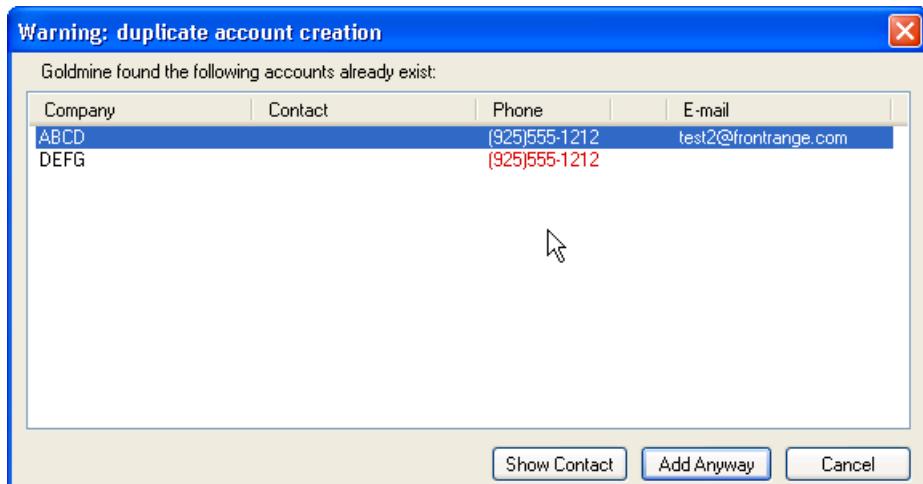
- Click **Show Contact** to see the record that contains the duplicate telephone number.
- Click **Add Anyway** to add the record with the duplicate telephone number.

Duplicate Email Addresses

If you create a new record and enter an email address that already exists for another record, the following dialog box opens.

- Click the **Leave the E-mail address attached to contact XXX (do not attach to this contact)** radio button to keep the email address with the original contact.

- Click the **Attached E-mail addresses to this contact (create duplicate)** radio button to keep the email address duplicate.

- Click the **Move the e-mail to this contact (remove from contact XXXX)** radio button to keep the email address and remove from the original contact.

Adding Contacts To an Existing Company

You can create a new contact and add it to an existing company. These contacts will appear on the Relationship tab.

1. At the Contact list view, double-click on a contact.

   The Detail view for the contact opens.

2. Click on the Relationship tab and then click **Add Contact**.

   The Add Relationship dialog box opens.

3. The company attached to the contact is the default in the Company field. To search for another company, click the **Search** button.

   The Search Center opens and you can select the company you want.

4. At the **Contact** field, click the down arrow to select the new contact.

5. At the **Relation** field, click the down arrow to select the relationship of the new contact to the company.

   To create a new relation, click the down arrow, then select **Add New** and then type in the new relation.

6. Click one of the following:

   - **Save and New**. The new relationship appears in tree form on the Relationship tab.

   - **Save and Close**. The new relationship appears in tree form on the Relationship tab and then closes the Add Relationship dialog box.

   - **Cancel.** Cancel the relationship.

Editing Contact Records

You can update contact records with new information or changes.

1. Position the mouse cursor inside the field and click to activate a cursor.

2. Type your changes in the selected field, or edit based on F2 Lookup values.

    To edit based on the F2 Lookup list, click the right-facing arrow or press **F2** to display the predefined field values. Select the value to update the field with. You can add values to the F2 Lookups.

3. To advance between fields, press the `Tab` key. You may also select fields by clicking **CTRL+(First letter of field label).**

    Note that the **Tab** key goes through fields in the order set in the **Field Properties dialog box>>Layout tab>> Field Order area**.

    Change the order by changing the Position Number. This does note affect where the fields display in the Contact record.

4. After editing the contact fields, press **ESC** or go to the next record to edit.

    Some fields, such as the **Last Update** field on the **Summary** tab, are display-only. GoldMine generates the value of these fields automatically, and prevents the user from making changes. If you click on one of these fields with the left mouse button, no action will take place.

Printing Contact Records

When you make a print request, GoldMine gathers the contact information into a report and then prints the report.

1. Select the contact record you want to print and click the **Print** button.
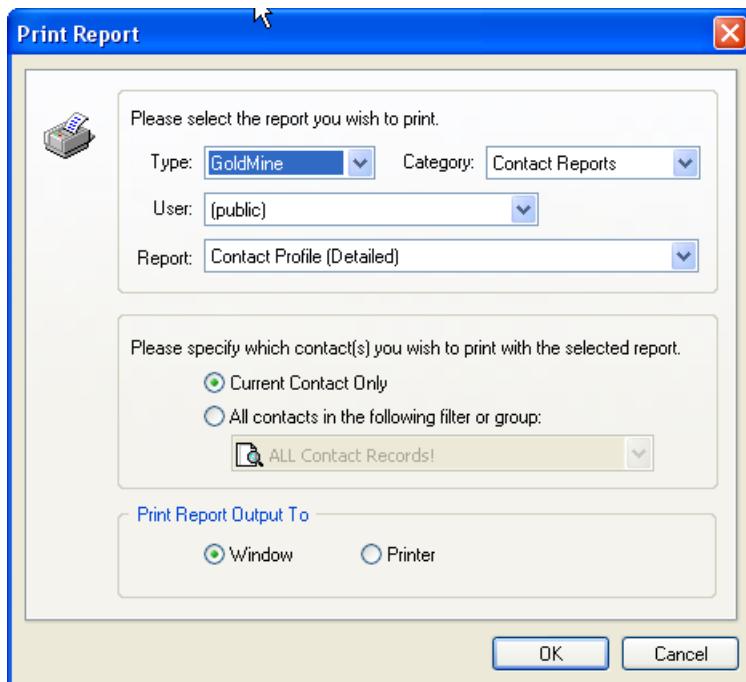
2. At the Print Report dialog box, complete the fields:

- **Type.** Select the product type of report, for example GoldMine.
- **Category.** Select the category of report, for example Service Report or Contact Report.
- **User.** Select the user of the report, if needed.
- **Report.** The name of the report.
- **Current contact only.** Select this option to print a report for the contact.
- **All contacts in the following filters or groups.** Select this option to print all contacts or all contacts in a filter or group, and then select the filter or group. The default is **All Contacts**.
- To send the report to a window online, select **Window**. To send the report to a printer, select **Printer.**

  The report displays or starts to print.

Linking Files to a Contact Record

GoldMine stores linked document records under the **Links tab**. For example, if a prospect calls to discuss a bid you sent, retrieve the document by double-clicking the link stored with the prospect's record.

Use linked documents as the basis of building a group.

Also manually link documents using the local menu in the **Links tab** or by dragging and dropping files from Microsoft Windows Explorer into GoldMine. In addition to file links, link any Windows folder to a contact record.

Displaying Multiple Contact Records

Display many contact records in the GoldMine work area. Only one record can be active on the screen.

1. At the Contacts list view, select **Window>>New Contact Window**.

    A new contact window appears with the same information as the first contact window.

2. Scroll through the contacts. If you have a large amount of contacts, use the Contact Search Center or the Universal Search to locate the contact.

    Each new contact window you open is a duplicate of the active window.

Deleting Contact Records

You can delete contact records from your database using the Delete option or the Delete Wizard.

To use the Delete Wizard, you must have Master Rights. For more information see "Using the Delete Wizard" on page 86.

To delete all or part of a record, the record must be active on the screen, and you must have both **Delete** and **Edit Tab Folders** permissions.

Use the following procedure to delete a contact record.

1. Select the contact record to delete.

2. Click **Delete** ☒ in the Contact toolbar.

3. At the Delete contact record dialog box select an option.

> **NOTE:** By default, all checkboxes are selected. Review selected boxes before selecting Delete. You cannot undo deletions.

- **Delete the selected contact record.** Deletes the current contact record, including its related additional contacts, detail entries, and referrals. History records for the contact are not deleted, but become unlinked activities.
- **Delete contact's scheduled activities.** Deletes all pending activities for the current contact.
- **Delete contact's history records.** Deletes all history of activities for the current contact record. Since the same history file is used for viewing the Completed Activities history for a specific user, deleting the history of a contact record affects the activity analysis statistics for all the users who have completed those activities.
- **Delete contact's opportunity/project records.** Deletes all opportunity and/or projects linked to a contact. These records are removed from the Opportunities tab and/or the Projects tab. Selecting this option does not delete the opportunity or project from the Opportunity/Project Manager.
- **Delete contact's cases.** Deletes all cases linked to an opportunity.
- **Synchronize this record's deletions.** Lets deletions associated with this contact record be synchronized with remote sites.

4. Click **Delete**. GoldMine deletes the contact record.

Using the Delete Wizard

To update your contact database by deleting some or all calendar records, history and or contact records, use GoldMine's Delete Wizard to reduce the possibility of an unintentional deletion.

> **NOTE:** Only users with Master Rights can access the Delete Wizard.

Use the following procedure to delete records with the Delete Wizard.

1. Select **Tools>>Data Management>>Delete Records**.

   The **Delete Wizard** opens.

2. Select one delete option and then click **Next**.

   • **Delete old history record.** Purges old history data from the contact database. Delete all history records from the contact database, or activate a filter or group, then use this option to delete history records from the subset of records.

   > **NOTE:** Removing old history records periodically can significantly reduce the amount of disk space used by contact sets.

   • **Delete ALL (filtered) contact records.** Deletes a subset of records from the contact database based on a filter or group.
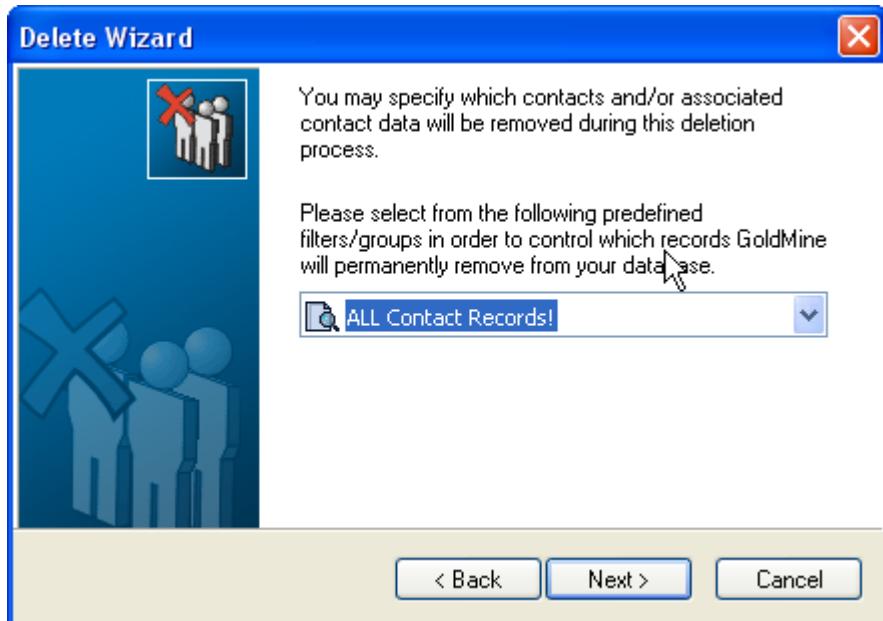
3. Specify the records you want to delete by clicking the down-arrow and selecting a group or filter. The default is **All contact records**. Click **Next**.

4. If you selected **Delete old history files**, select a date from which you want files deleted. If you want all files deleted up to 10/01, for example, select that date. Then type in *Delete All History Files.* This requirement reduces the possibility of an unintentional deletion of contact records. Click **Next.**

If you selected **Delete ALL (filtered)** contact records, complete the delete window. For instructions on completing this window, see "Deleting Contact Records" on page 85. Then type in *Delete All contact records* This requirement reduces the possibility of an unintentional deletion of contact records. Click **Next**.
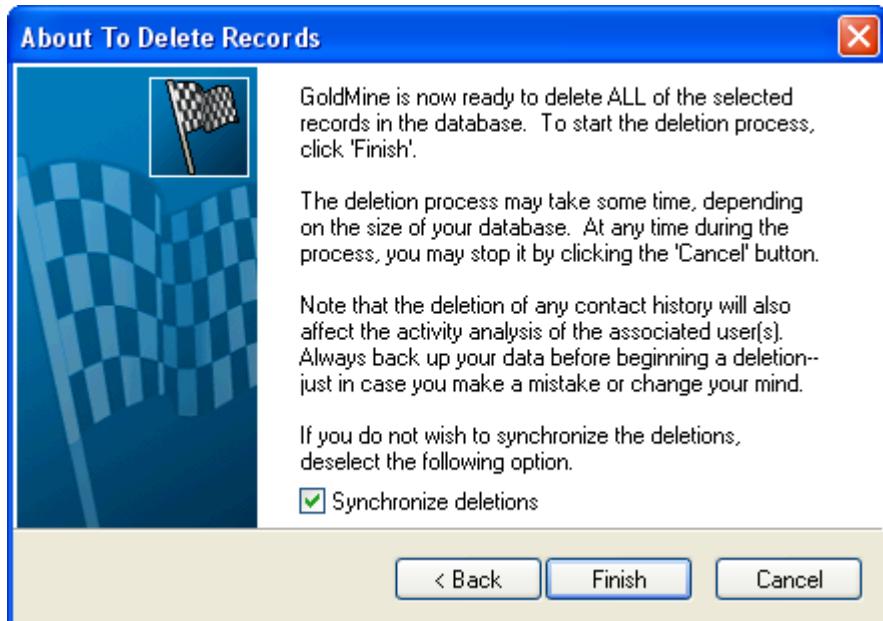
5. If you do not want to synchronize the deletions, unselect **Synchronize Deletions** and then click **Finish**.

If you select **Delete ALL,** the Delete ALL contact records dialog box opens.

Working with Contact Details

Define or view contact details for an active contact record.Contact details provide information for the following:

- **Occasions.** Create occasions recurring occasions for contacts.
- **Free/Busy.** Access a contact's free/busy file (.ifb) to a file, ftp site, or http site so GoldMine can read it.See
- **Digital IDs.** Import a contact's digital ID file (.p7b and.cer) to use enhanced security on signatures and encryption. See the Setting Digital ID section in the *GoldMine 8.5 Administration Guide*.

For more information on Occasions and Free/Busy, see "Accessing Your Calendar" on page 172.

About the Relationships Tab

The GoldMine Relationships tab graphically displays organizational relationships and contact information in a relationship tree structure. By default, it appears as the first tab in the contact record tabs.

Navigate the Relationships tab using its local menu or toolbar. Use the Relationships Tab to:

Create Relationships, Sections, and Contacts.

Set read and update access on relationships, sections, and contacts.

Activate groups based on the Relationships hierarchy.

Copy data to a group of contacts based on the Relationship.

Creating Relationships

Relationships are linked to the specified contact record. The relationship's name is taken from the Company field of the selected contact record. Create up to 5 subsidiary levels under each organization and link contacts to any section.

Use the following procedure to create a relationship.

1. At the Relationships Tab, right-click and select **Create a new Relationship** (if the pane is empty), or Look Up a Relationship.

The New Relationship Tree Options dialog box appears.

2. Select from the following options as needed:

- **Lookup another contact and create a Relationship.** Launches the Contact Search Center and lets you add a new Relationship to another contact record.

- **Create a Relationship based on.** Creates the Relationship based on the current contact Record.

3. Add sections and contacts to existing relationship trees.

Adding Contacts To Existing Relationship Trees

You can create a new contact and add it to an existing company. These contacts display on the **Relationship** tab.

Use the following procedure to add contacts to an existing relationship tree.

1. At the Contact list view, double-click on a contact.

At the Detail view for the contact, click on the **Relationship** tab if not selected.

2. Right-click on the relationship tree and select **New Contact.**

3. To add an existing contact, select **Lookup an existing contact and add it to section.**

Double-click on the name to be added.

4. To create a new contact, select **Create a new contact and link**.

Complete the **New Relationship to an Existing Company** dialog box. For more information on completing this dialog box, see "Creating a New Contact Record" on page 77.

Creating Relationship Sections

Use the following procedure to subdivide an organization into divisions or departments.

1. At the **Relationship** tab, right-click an existing relationship and select **New Section.**

    The **Section Properties** dialog box appears.

2. At the **Section Heading** text box, accept the default contact as the section heading title or type a new one.
3. Select **Link to <contact>** to link the contact to a relationship tree.
4. At the **Insert new section** list, select where you want the new relationship to reside and then click **OK**:

    •   **Under Manager.** Places the new section as a subcategory of the manager category.

    •   **Above Manager.** Places the new section as a separate heading above the manager category.

    •   **Below manager.** Places the new section as a separate heading below the manager category.

Adding Contacts to Relationships

Use the following procedure to add contacts to existing relationships and relationship sections, creating links between contact records.

1. At the **Relationship t**ab, select a relationship or section and right-click to select **New Contact**.

2. To add a contact, select:

   Look up an existing Contact and add it to the Section. Launches the Center and lets you search for a contact. Double-click on a contact to add it to the Relationship.

   Create a new contact and link. Launches the New Company and Contact dialog box. When finished, the contact is added to the existing Relationship and to the Relationship on the new contact record.

   Link all Group/Filter Contacts to the Section. Adds all the members of the activated filter or group to the Relationship.

About the Details Tab

The Details tab stores information about the contact, such as email addresses, pager PIN, birth dates and so on. This information is indexed for record searching. Web site and Internet email addresses store in the Details tab.

Store additional user-defined information in the contact Details tab section. The Details tab lets you store multiple pieces of information on the same subject without creating new fields (for example, if keeping track of the types of cars a contact owns, you can create a separate record for each vehicle without creating new fields).

The Detail tab supports a one-to-many relationship with the contact. The data stores in the **ContSupp** table. Each record contains at least the following:

- **Date.** The date the detail record was created.

- **Detail.** The name of the detail record entry (Credit Card Number, Computer Type).

- **Reference.** The value associated with the detail entry (for example, if the detail entry is *Computer Type*, the reference would be *Dell*).

Define standard detail records using the F2 Lookup list. Customize by creating extended detail records. Add a Detail to the Detail Tab by right-clicking the tab and selecting **New**. The **Detail Properties** dialog box opens.

Adding Detail Records

Define a new Detail record to track basic information on topics meaningful to your business. Detail records are added to the Detail Lookup list (**F2**).

Every Detail created also has its own Reference Lookup list.

Use the following procedure to add a detail record.

1. Right-click under the **Details tab** and select **New**.
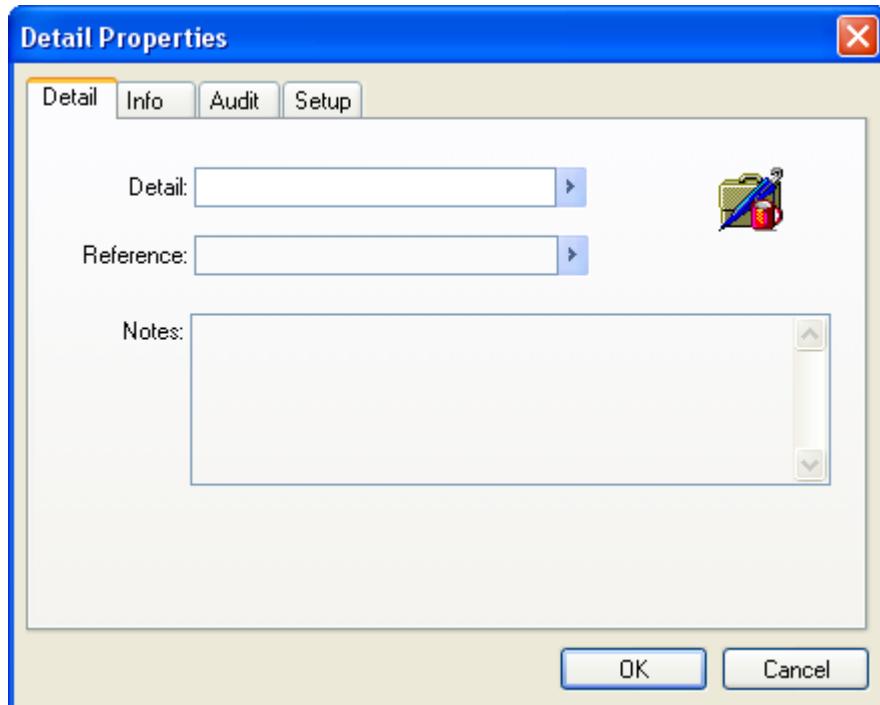
2. At the **Detail tab>> Detail** field, select a predefined value from the Detail F2 Lookup list.

3. In the **Reference** field, type or select a value from the Reference F2 Lookup.

4. To add any notes to this detail (up to 64,000 characters), type them in the **Notes** field.

   Notes are unique to each detail record.

5. Click the **Info tab** if needed.

   You can update up to twelve fields. Customize the field labels through the **Setup tab.** For more information about the Setup tab, see the Creating Details Information Fields section in the *Goldmine 8.5 Administration Guide.*

   Each field can be controlled by the F2 Lookup, requiring users to input consistent information using the **Setup tab** on the dialog box.

6. If entering an email address, select **Primary Address** to use the selected address as the primary (default) address for the contact.

7. In the **Audit tab** you can view the information about the contact record creation and updates.

   You cannot change the information on this tab.

Deleting a Detail Record

Use the following procedure to delete a detail record

1. Select the record to delete and right-click.

2. At the local menu, select **Delete.**

About the Pending Tab

The Pending tab displays all activities scheduled for the contact. Use the Pending tab local menu to manage pending activities for the contact record.

The Pending tab contains the following fields:

• **Activity.** Displays a value (based on type of scheduled activity). Activities include:

  • Appt (appointment)
  • Call (call-back)
  • Action (next action)
  • Lit (literature request)
  • Message (message)
  • Sale (forecasted sale)
  • Other (other action)
  • To-do (to-do)
  • OutMail (queued Internet e-mail messages)

- **Date.** Date activity is scheduled for completion.
- **Time.** Scheduled time of the activity.
- **User.** Name of the user for whom the activity is scheduled.
- **Code.** Activity code, or other identifier, that categorizes the activity.
- **Reference.** Reference information entered for the scheduled activity (Follow-up, Close deal).

Activities Local Menu

The Activities local menu allows you manage scheduled activities in the Pending tab and Activity list. For example, you can schedule an appointment or complete a call.

The local menu contains the following:

- **Schedule.** Lets you select a particular activity type to schedule.
- **Zoom.** Opens the activity Zoom dialog box, allowing you to view, complete, or delete an activity.
- **Complete.** Completes the selected activity.
- **Reply.** Opens the Reply to an activity dialog box and then lets you send e-mail to the user regarding the activity.
- **Options.** Allows you select Auto-Update or Filter.
- **Find.** Opens the Find dialog box, allowing you to search for a particular activity record.
- **Output to.** Allows you to select Printer, Word, Excel, Clipboard, or iCalendar file for output options.
- **Delete.** Removes the selected activity without creating a history record.
- **Edit.** Opens the Schedule an activity dialog box, allowing you the edit the information.

About the Notes Tab

The Notes tab allows you to store free-form written information about the contact, such as any general contact information that does not fit conveniently into fixed-length fields on the contact. This tab field can hold several hundred lines of text for each contact (a limit of 64,000 characters).

The actual amounts may be dependant on the free memory in your computer. Screen refresh slows as the size of the Notes grows (because the entire Notes field must be read from the database each time a contact record is displayed). Use manageable segments, the History tab, or create a linked document.

Use the following procedure to add, edit or delete a note to the Note tab.

1. At the **Notes tab**, click **Add note.**

   The Notes area opens.

2. After completing the note, click the Save button.

3. An Alert of Suggestions window appears. Use the suggestions if you need them.

   The note appears in the **Notes tab** with a timestamp.

4. To edit a note, select the note, right-click to bring up the local menu, and then click **Edit.**

5. To delete a note, select the note, right-click to bring up the local menu, and then click **Delete.**

Track daily interactions with the contact on the History tab. This tab has an extensive notes field and is easy to sort and search.

About the Referrals Tab

Referrals create a link between two contact records in the database. When a prospect is referred to a salesperson, a record of the referral is maintained here. After you establish the link, jump to the linked contact record by double-clicking on a referral record. The tab contains:

Date. Date created.

Referral. Name of the company linked to the referral record.

Reference. Detailed information (reason for the referral).

User. Name of the user creating the referral record.

GoldMine adds a **To:** to the entry in the originating contact record, adds a **For:** to the entry for the contact selected from the Contact Search Center, and then records the action in the History tab.

Use the following procedure to create referral records.

1. Click on the **Referrals tab** or click the down-arrow and select **Referrals** from the drop-down list.

2. Right-click in the area below the **Referrals tab** and select **New.**

3. Using the Contact Search Center, search for the contact you want to create a link for.

4. Double-click the contact to launch the **Referral Properties** dialog box.

5. The **Refer this contact** field displays the active contact record and the **To this contact** text box displays the contact selected. In the Reference fields, type a description or select an F2 Lookup description.

6. Click **Insert Notes** to create a date/time stamp and then type a note.

   The **Audit tab** displays historical information.

7. Select the Status tab to select the current status from a list that ranges from **Initial Contact to Done!**

8. Select one or more of the options to share with other users and then click **OK.**

   GoldMine adds a To: to the entry in the originating contact record, a For: to the entry for the contact selected from the Contact Search Center, and updates the contact's History record.

About the History Tab

The History tab stores completed scheduled and unscheduled activities for the contact. The tab displays the following information:

- **Date.** Date the activity was completed.

- **User.** Name of the GoldMine user who completed the activity.

- **Activity.** Type of activity. GoldMine records these types:

Action	Next Action
Appoint.	Appointment
Call Back	Scheduled call
Call In	Incoming call
Call Out	Outgoing call
E-mail In	Received email
E-mail Out	Sent e-mail
Event	Event
Form	Mail-merged correspondence form
Lit	Fulfilled literature request
MsgRtn	Returned message
Msg Filed	Filed message
Other	Other action
To-do	To-do action

Code. Activity code associated with the completed activity. To display the Code column, place ShowHistActvCode=1 in the [ActvObj] section of the username.ini.

Result. The result code lets you categorize the outcome of the activity. Use it to analyze completed activities.

Reference. Reference information entered when the activity was completed. Indicates what action was taken (Sent letter, Left voice mail). If you activate a history filter from the local menu, GoldMine places [Filter Active] in the Reference column title.

Notes. Freeform text about the completed activity. Can include all notes added as the activity progressed or information explaining a user's involvement with a contact. Field stores up to 32 kb per record, with no limit to the number of history records per contact.

About the Summary Tab

Displays activity information for the contact and the contact record. You cannot change the field settings in the Summary tab. The tab contains:

Comments. Displays miscellaneous information of up to 65 characters. Scroll to display entire contents.

Prev Result. Displays reference information entered for the last calendar activity for this contact. Automatically updates each time a calendar activity is completed. Edit as needed.

Next Step. Displays information about the next activity as sorted by record type code.

Next Action. Earliest scheduled date of a next action for this contact. Automatically maintains the date of the pending Next Action scheduled on the Calendar.

Appointment. Date of the first scheduled appointment.

Call Back. Date of the earliest scheduled call back.

Forecast. Date of the forecasted sale recorded on the Calendar with the earliest predicted close date.

Last Contact. Updates date and time fields whenever a telephone activity is successfully completed.

Last Attempt. Updates date and time fields whenever any activity is completed as unsuccessful.

Last Update. Updates fields to indicate user who last edited the contact record and the date.

Creation. Updates fields to indicate user who created the contact record and the date.

Record.

- **Firebird** and **SQL**. Displays n/a in the field because SQL databases do not run true record counts. Run an SQL query to get a record count. For more information on running queries, see the *GoldMine 8.5 Administrators Guide*.

Searching for Contacts

When working in a large database, trying to locate a contact or for information on a contact record by scrolling through the contact records one at a time is inefficient and time-consuming.

GoldMine Premium Edition two search options to help you search for, organize, and communicate with contacts, the **Contact Search Center** and **Universal Search.**

To facilitate efficient searching, use the Contact Search Center, or create SQL Query Filters.

The Contact Search Center is a central search window. You can find one record, or groups of records, based on criteria you entered or searches you saved.

Accessing the Contact Search Center

You can access the Contact Search Center by using one of the following methods:

- Clicking the **Search** toolbar button. Launches the Center with current Contact (primary) as the selected search field.

- Clicking on **GoTo>>Contact Search Center.**

- Entering a name or text string in the **Find Contact** search field at the top of the Navigation Pane, and clicking **Go**. Launches the Center with the results from the search field.

- Double-clicking an indexed **field label.** Launches the Center with the selected field as the Lookup option.

The Contact Search Center contains a toolbar for easy access to search center functions.

Saving Searches

After creating and running searches, save the searches using these options:

- Saving search as a filter
- Saving search results as a group

Use the following procedure to save search criteria as a filter.

1. After creating a search in the Center, save it as a filter search and then click **Save.**

    The save menu appears.

2. Select **All Listed Records.**

3. Select **Save as Filter**.

    The **New Filter** dialog box appears.

4. Type a name in the **Filter Name** text box.

5. Select a filter owner from the User drop-down list.

6. Click **OK**.

    The filter is saved and the name appears below the specified user's filters in the **Filters** tab of **Filters and Groups.**

Use the following procedure to save search criteria as a group.

1. After creating a search in the Contact Search Center, save the results as a group and click **Save**.
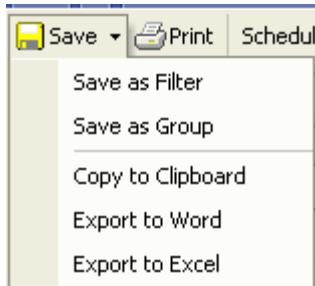
    The **Save** menu opens.

2. Select **Only Tagged Records** to save only tagged records in the new group, or **All Listed Records** to save the entire list of records.

3. Select **Save as Group.**

   The **Group Profile** dialog box appears.

4. In the **Group Name t**ext box, type in a name.

5. In the **Code** text box, type or select a code from the F2 Lookup list.

6. From the **User** drop-down list, select a group.

7. Click **OK.**

   The results are saved and the group name appears below the selected user's groups in the **Groups** tab of **Filters and Groups**.

Searching for Contact Records

Searches can be based on indexed fields, primary and additional contacts, email addresses, and user-defined fields. Use the following procedure to search for a contact record.

1. Open a contact record.

2. In the contact record, do one of the following to open the Contact Search Center:

   • Double-click on a field such as **Company** or **Contact.**

   • Right-click on a field and select **Lookup <field name>**.

   • Click **Search** in the Global Toolbar

   • Type search criteria in the search field at the top of the Navigation Pane and click **Go**.

   The Contact Search Center opens with the selected field in the Lookup text box.

   The default search tool uses filter expression operators and boolean operators, and can be expanded to include many criteria. An optional SQL Query Editor can be used simultaneously. For more information on filter expressions, see "Using Filters, Queries, and Groups" on page 126 or contact your administrator.

3. At the **Search-by** drop-down list, select from the following criteria:

   • **Primary Search Criteria.** The most commonly used search criteria is at the top of the pull-down menu.

   • **Contact (primary).** Searches the primary contacts based on the search criteria.

- **Name (additional).** Searches for additional contacts based on the search criteria.
- **E-mail.** Searches for e-mail addresses based on the search criteria.
- **Details.** Opens the Lookup a contact based on a detail dialog.
- **Additional Search Criteria.** The following shows the additional search criteria you can select.

4. Type ALT+O to select Additional Contacts.

Acct Mgr City Company Country Industry Interest Last Open Phone 1 Postal Code Record Type State ------------------------------------- Accountno Acct Mgr (Key4) Actionon Address (Address1) Address (Address2) Address3 Age (Uage) Callbackat Callbackon Callbkfreq City Closedate	Contact 1 Fields (Indexed) **Contact 1** and **Contact 2 Fields (Non-Indexed)** Note that text within parentheses () is the database field name if different than what is shown in the contact record.

Comments	
Company	
Contact	
Country	
Createat	
Createby	
Createon	
Dept (Department)	
Ext1	
Ext2	
Ext3	
Ext4	
Fax	
Industry (Key2)	
Interest (Key3)	
Last (Lastname)	
Lastatmpat	
Lastatmpon	
Lastcontat	
Lastconton	
Lastdate	
Lasttime	
Lastuser	
Meetdateon	
Meettimeat	
Mergecodes	
Nextaction	
Notes	
Open (Key5)	
Owner	

Phone 1 (Phone1) Phone 2 (Phone2) Phone 3 (Phone3) Postal Code (Zip) Prefix (Dear) Prevresult Record Type (Key1) Secr Source State Status Title Userdef01 Userdef02 Userdef03 Userdef04 Userdef05 Userdef06 Userdef07 Userdef08 Userdef09 Userdef10 Userdef11 Userdef12 Userdef13 Userdef14 Userdef15 Userdef16 -------------------------------------- Record Type	**Search by Record Type**.The value text box becomes a pull-down menu populated with configured Record Types.

5. In the **Begin with** field, select the filter expression operator from the drop-down list, for example *Equal to*.

   In the text box next to **Begin with**, type the search value after the filter expression operator.

6. If necessary, change the displayed columns. For more information, on displayed columns, see "Browser Column Selection" on page 110.

   Change the width of a column to optimize the display. Change the size of a column using typical Microsoft Windows mouse functions on the border of the column at the heading level. For more information see the *Microsoft Windows* documentation.

7. To expand your boolean search, click **Add** ⊞ at the far right of the **Search by** menu.

   A new menu appears beneath the previous menu, preceded by an AND/OR option.

   • Select **AND** to create a search that returns records matching all of the criteria.

   • Select **OR** to create a search that returns records matching any of the criteria.

   Examples.

   Records matching all criteria are returned:
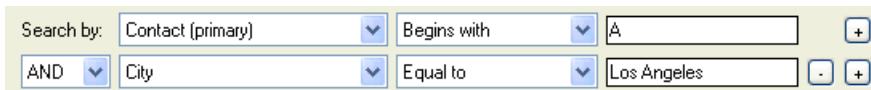
Search by:	Contact (primary)	⌄	Begins with	⌄	A	⊞
AND ⌄	City	⌄	Equal to	⌄	Los Angeles	⊟ ⊞

   Records matching any criteria are returned:
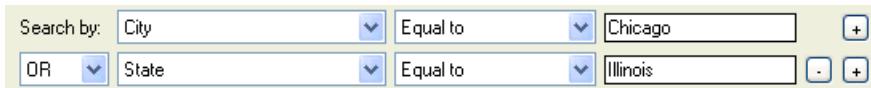
Search by:	City	⌄	Equal to	⌄	Chicago	⊞
OR ⌄	State	⌄	Equal to	⌄	Illinois	⊟ ⊞

8. Right-click in the browse columns to access other functions. The browser columns local menu appears.

   Schedule an activity by working with the Center and the GoldMine Calendar. Select a contact to be scheduled and drag it to the open Calendar. When you release the mouse button, GoldMine displays the Schedule an Activity window. Use it to schedule an appointment or other activity for the selected contact.

9. Save your search criteria as a Filter or search results as a Group.

Contact Search Center Query Editor

1. At the **Default Search/Query Editor** drop-down menu in the toolbar, select **Query Editor**. This adds a window under the default search tools for editing and previewing SQL searches within the Contact Search Center.

When Query Editor is selected from the Default Search/Query Editor drop-down menu, the following window appears:

2. Select the **SQL** radio button to view the query in SQL format.

3. Select the **xBase** radio button to view the query in xBase format.

4. To edit the query, click **Edit.** The view window becomes active for editing.

5. Edit the query in either SQL or xBase. Click **Preview** to view the result in the Contact Search Center table.

6. To close the Query Editor, select Default Search from the **Default Search/Query Editor** drop-down menu in the toolbar.

Browser Column Selection

By default, the Center displays the Company, Contact, Phone 1, City, State, and Postal Code fields. Change the information in the displayed columns to suit your needs.

In the **Contact Search Center**, right-click in the column area and select Select Columns. The Browser Column Selection dialog box appears.

- To add a field to the displayed browser columns, select the field name in the Available columns list and click the right arrow. The field is added to the bottom of the Selected columns list.
- Fields are listed in the order displayed in the Center. To change the order to the displayed fields, select the field in the Selected columns list and click Up or Down.
- To remove a field from the Center display, select the field name in the Selected columns list and click the left arrow.

The **OK** button is available only after you make a change in the dialog box. If you do not make any changes, click **Cancel** to close the dialog box.

Syncing Contacts in the Contact Search Center

When working with Center search results and Records, apply the Sync Contact option.

To Sync Contacts

1. In the Center, display search results in the browse columns.
2. Right-click in the browser columns and select **Sync Contact**.

   The record you select in the browse columns automatically becomes the displayed Record.
3. Turn off **Sync Contact** using the same method.

About Universal Search

Your organization might have information stored in many places in your GoldMine Premium Edition database - in emails, contact notes, activity notes, linked documents, the Knowledge Base and so on. You may not even know all the information that exists or where it is located because it was entered by another person.

In GoldMine Premium Edition the Universal Search feature is provided as a single view to quickly find out what information is in your system and how to navigate to it.

Universal Search is a one-box search engine that allows you to quickly access a summary view of the information you are looking for, along with links to more detailed information.

With Universal Search you can create a clear picture of your customer because you have access to all the information about your customer in your database whether or not you entered it in the database. Universal Search is very useful for searching on price lists, sales kickoffs, return policies and so on.

Prerequisites

Before using Universal Search, make sure you have the following applications installed on your computer.

- **Microsoft SQL Server 2005.**

  If using SQL Server 2005 Express, you have to install Microsoft SQL Server 2005 Express Edition with Advanced Services in order to use Universal Search.

- **Microsoft SQL Server 2008.**

  If using SQL Server 2008 Express, you have to install SQL Server 2008 Express with Advanced Services in order to use Universal Search.

> **NOTE:** Windows Search is not installed by default on Windows Server 2008. The service can be installed through the Server Manager **(Start>>Administrative Tools>> Server Manager>> Roles>>File Service>> Role Services)**.

Microsoft Windows Desktop Search Engine. This tool can instantly find documents, e-mail, attachments, and more. For installation and usage information look at this website:

http://www.microsoft.com/windows/products/winfamily/desktopsearch/default.mspx

Microsoft SQL Server Full-Text Engine. This tool is a full-text indexing and search engine. For installation and usage information, look at this website:

http://msdn.microsoft.com/en-us/library/ms142587.aspx

Security

GoldMine Premium Edition will search emails. If the message is accessible through GoldMine, it will be returned by a search and will check access rights for the Calendar and History areas.

The Universal Search feature will not search for information in foreign emails.

Searching for Contacts with Universal Search

1. Navigate to **GoTo>>Search>>Universal Search.**

    The Universal Search view opens.

2. At the **Search** field, type in the name or keyword for which you are searching and then click **Go.**
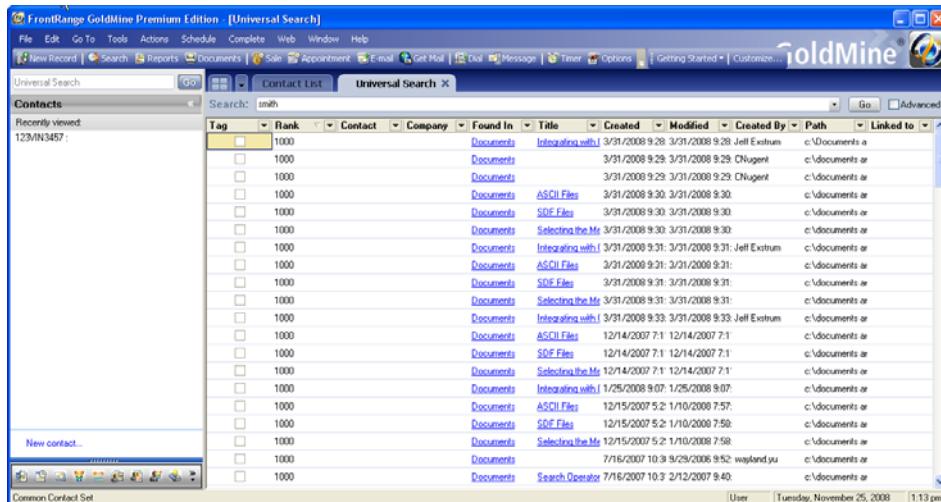
A grid showing the search results displays with the following field labels:

- **Tag.** You can tag (that is, check) a result and then, by clicking on the small down arrow next to the column title, select a filter criteria (for example, True) to show only the tagged records. More important, you can tag records in the search results to activate them as a contact filter.

- **Rank.** The row ranking of the record**.** The lower the number the more likely the information you are searching for exists in this record.

- **Contact.**The name of the contact.

- **Company.** The name of the company name.

- **Found In.** The location of the search results. It may be in several places such as the **Contact** tab or the **Notes** tab, **History** tab and so on.

- **Title.** Depends on the result in the **Found In** column. For example, if the result is **Contact,** the title is the contact's title; if the result is an email the title is subject of the email; if the result is Knowledge Base, the title of the topic and so on.

- **Created.** The date the result (contact, activity, email and so on) was created.

- **Modified.** The date the result (contact, activity, email and so on) was modified.

- **Created By.** The person who created the result.

- **Documents.** Shows how a search result is linked to GoldMine.

  For example, a file added to a contact record as a Links record. If the file is part of the search result the Linked to column would display the contact to which the file was linked. All. Brings up results of all.

3. To open the file you are looking for, do one of the following:
   - Double-click on any of the links in the grid such as Name or Title.

4. Right-click on the line of the contact and select:
   - **Go to Contact.** Opens the contact window with the selected contact.
   - **Go to Found In.** Drills down on an object type,
   - **Output to Printer, Excel, Word.** The output to printer option generates the system report associated with this area. It displays the report in a tab or window from which it can be printed.
   - **Save as.** Save as a **New Group** or an **Existing Group**. If you tag a Contacts type result, this option allows you add the contacts to a new group or an exiting group.

Using the Universal Search Advanced Feature

The following procedure provides the steps for more advanced searches.

1. For advanced search options, click on the **Advanced** checkbox.

    The Advanced Search window opens.
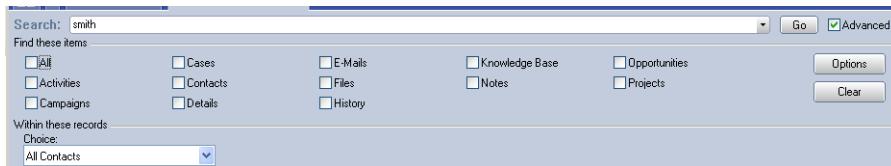
2. At the **Find these items** area, select the area where the search item resides. You can select **All** (all records) to see all items or one of the tabs such as Activities, History, and so on. This also includes checkboxes corresponding to search filters, except for those applied to contact records.

    To clear your selection, click **Clear.**

3. To change your Universal Search options, click **Options.** For more information on selecting options, see "Setting Universal Search Options" on page 116.

    • If the search filter is associated with Contacts, it will appear in the drop-down list at the bottom of the **Options** pane when you select Search Filter in the Choice dropdown.

    • If the search filters is associated with any other type of information, it will appear as a checkbox under **Find these items**. If a filter of this type is owned by a different user, you need to go to **Options>>Search Filters**, select the **Owner**, and then check the box next to each filter you want to use.

> **NOTE:** The checkboxes in the **Find these items** section use "OR" logic, so items matching any of the checkboxes will be returned. It is important to understand this to make the search filters effective.

4. In the **Within these records area**, at the **Choice** field, select a search criteria and then click **Go.** The choices are:

   • **All Contact.** Searches all contacts. Note that the **owner** and **filter name** fields are not activated because this search includes all records.

   • **Active contact.** Searches the active contact. Note that the **owner and filter name** fields are not activated because this search includes the active contact.

   • **Active filter.** This search is limited to contacts returned by the currently active contact filter.

   • **Contact Filter.** Searches within a contact filter.

   • **Contact Group.** Searches within a contact filter. If there are no active filters, the **owner** and **name** fields are not activated (they are grayed out).

   If there are no active groups, the **owner** and **filter name** fields are not activated (they are grayed out).

   If there are active groups, at the **Group owner** field, select the group owner. At the **Group filter name** field, select the name of the filter.

   • **Search Filter.** Searches within contact filters create for Universal Search.

5. At the **Filter owner** field, select the group owner.

   At the **Filter name** field, select the name of the filter.

> **NOTE:** You can save Universal Searches by tagging a record, then right-click and select **Save As**.

Setting Universal Search Options

Set up your search options according to your needs. GoldMine Premium Edition allows you to create filter expressions in an operation such as performing a global replace based on a filter.

1. Navigate to **GoTo>>Search>>Universal Search** and click the **Advanced checkbox.**

2. Click **Options.**

    The **Properties dialog box** opens.
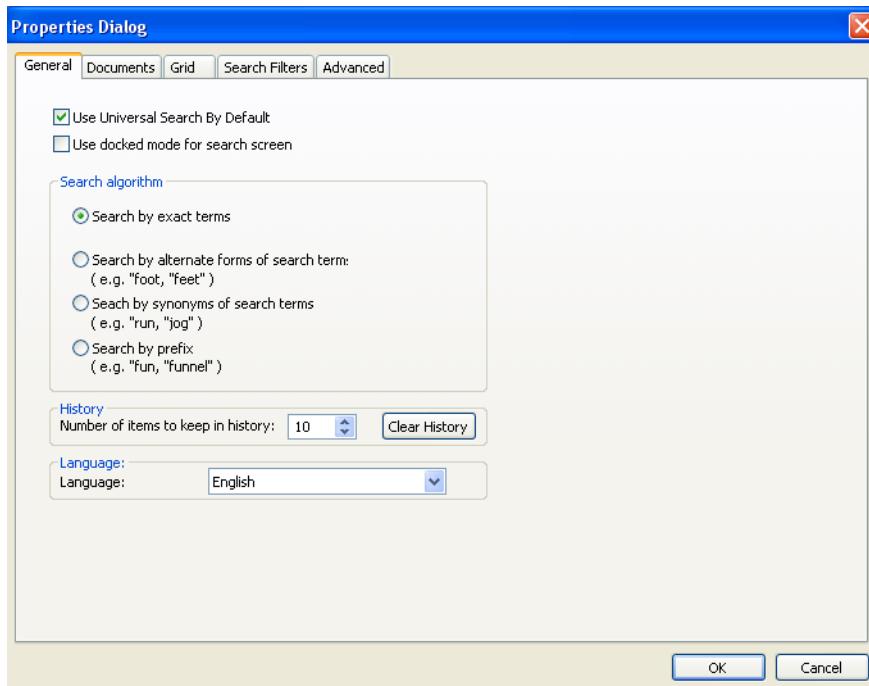
3. At the **General** tab, select from the following options:
    - **Use Universal Search By Default.** Click this checkbox to enable Universal Search as the Navigation panel, search field, search engine.
    - **Use docked mode for search screen.** Click this checkbox to dock the Universal Search window (the Universal Search window can be a floating window or attached to an edge of the GoldMine workspace).
    - **Search by exact terms.** Click this radio button to search for records that match the search term.

- **Search by alternative forms of search term.** Click this button to search for the different tenses of a verb, or for both the singular and plural forms of a noun. This means you can search for any form of a term; for example search you can search on *foot* and include *feet* as a search term.

- **Search by synonyms of search terms.** Click this radio button to search for synonyms of search terms. In Microsoft SQL Server 2005, the full-text queries use a thesaurus to find synonyms of search terms.

> **NOTE:** The thesaurus file must be edited. For more information, see *How to: Edit a Thesaurus File* at: http://msdn.microsoft.com/en-us/library/ms345187(SQL.90).aspx

- **Search by prefix.** Click this button to search on the prefix (the first few letters) of a word.

- **Number of items to keep in history.** Specifies the number of search terms to save. Enter a value or click on the spinner control to increase or decrease the number.

- **Clear History button.** Click this button to remove saved search terms.

- **Language.** Select the language for the search results from the dropdown box.

4. At the **Documents** tab, you can specify the document locations that the Windows Desktop Search Engine will search (this tab is not displayed if Windows Desktop Search is not installed). Complete the following fields as needed.
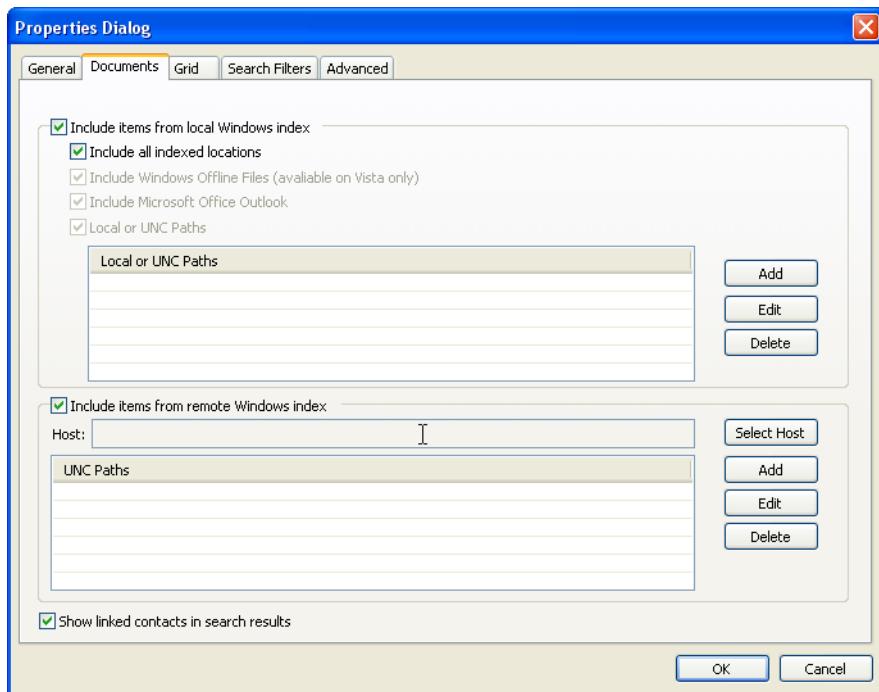
Complete the following fields as needed.

- **Include items from local Windows index.** Click this checkbox to search documents using the local Windows Desktop Search index.

    - **Include all indexed locations.** Click this checkbox to search in all locations which are defined in Control Panel>>Indexing Options.

        In this case the check boxes are disabled, but if Local and UNC Paths is checked the Add, Edit and Delete buttons remain active.

    - **Include Microsoft Office Outlook (available on Vista only).** Click this checkbox to search information in the MS Outlook. To pickup Outlook mail, the messages need to be cached locally (for example, in a .pst, or .ost file).

- **Local or UNC path.** Click this checkbox to add, modify or remove user specified search folders. To add a new path, click **Add** and select the path. To edit an existing path, select the path and click **Edit**. To delete an existing path, select the path and click **Delete.**

> **NOTE:** On Microsoft Vista there is a *Windows Desktop Search: Add-in for Files on Microsoft Networks* that provides the option to add UNC paths as an indexed location. To download this option, go to: http://www.microsoft.com/downloads/ details.aspx?familyid=f7e981d9-5a3b-4872-a07e-220761e27283&displaylang=en

- **Include items from remote Windows index.** Click this checkbox to search documents on the remote computer. WDS (Windows Search) should be installed on both computers.

  Select Host. Click this button to select the name of a remote computer. The name appears in the **Host** field. To add a new path, click **Add** and select the path. To edit an existing path, select the path and click **Edit**. To delete an existing path, select the path and click **Delete**.

- **Show linked contacts in search results.** Select this checkbox to display all contacts linked to the search.

5. At the **Grid** tab you can configure the grid to your personal specifications. Complete the following fields as needed.
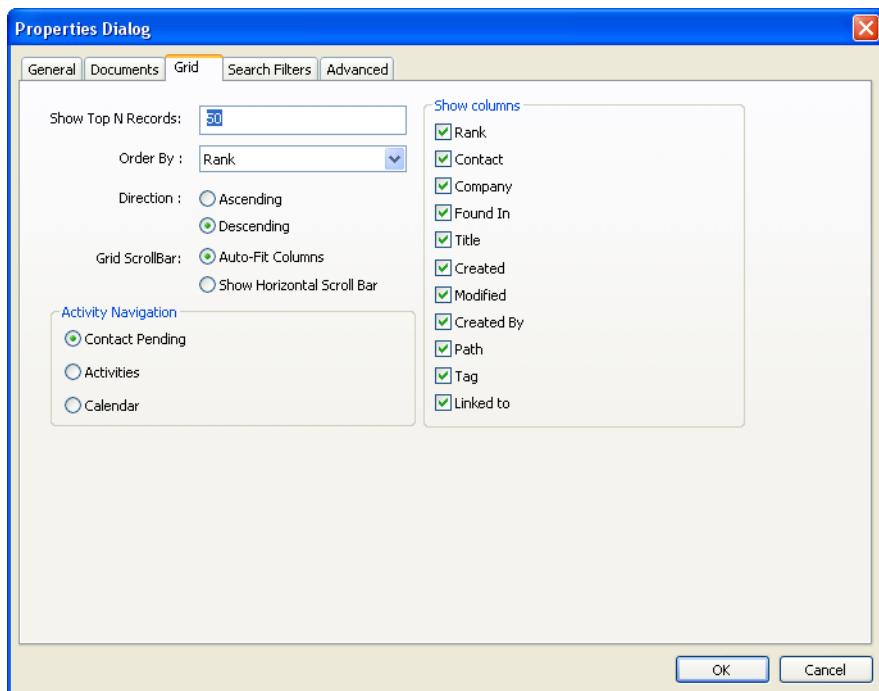
- **Show Top N Records.** Enter the number of queries to be limited in each area. For example, if you enter 50, you will see 50 rows or less in each area.
- **Order By**. Select an initial column to order the results by. Click on the down arrow and select a column.
- **Direction**. This option allows you to determine the sorting direction of the search results. The selections are **Ascending** and **Descending**.
- **Grid Scrollbar.** Select the location of the scrollbar. Selections are Auto-fit columns and Show **Horizontal Scroll Bars**.
- **Activity Navigation**. Select the location in which you want to see the found activity. Selections are Contact Pending Tab, Activities List and Calendar.
- **Show columns.** Select the columns you want to display.

6. At the **Search Filters** tab, create the desired search filters. This allows you limit a search to records returned by the search filter.
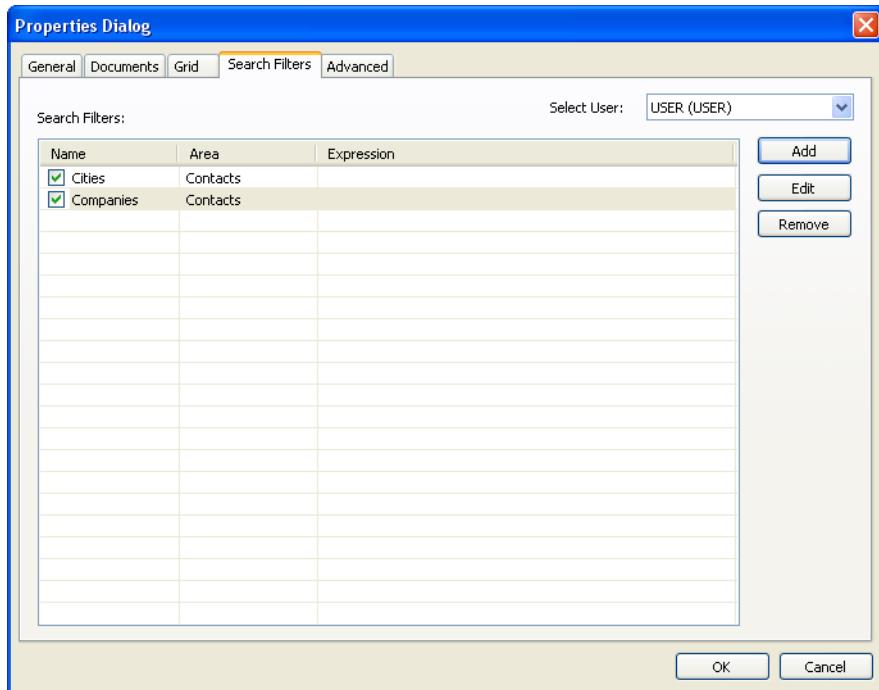
Select the following options:

- **Select User.** Lists the filters for the selected user. Select from the dropdown list.
- **Add.** Click this button to add a new filter.
    - **Name.** Type in the name of the new filter.
    - **Owner.** Select the owner.
    - **Area.** Select the area for the filter, for example Contact or Campaign.
    - **Expression.** Build the expression:

        Build. Click this button to open the GoldMineLookup Wizard and build a search filter as an SQL query.

        Check. Click this button to verify the filter expression.
- **Edit.** Select a filter and then click this button and make your edits.
- **Remove.** Select the filter you want to remove and then click this button.

7. At the **Advanced** tab, select the GoldMine tables that Microsoft Full Text Search will index.
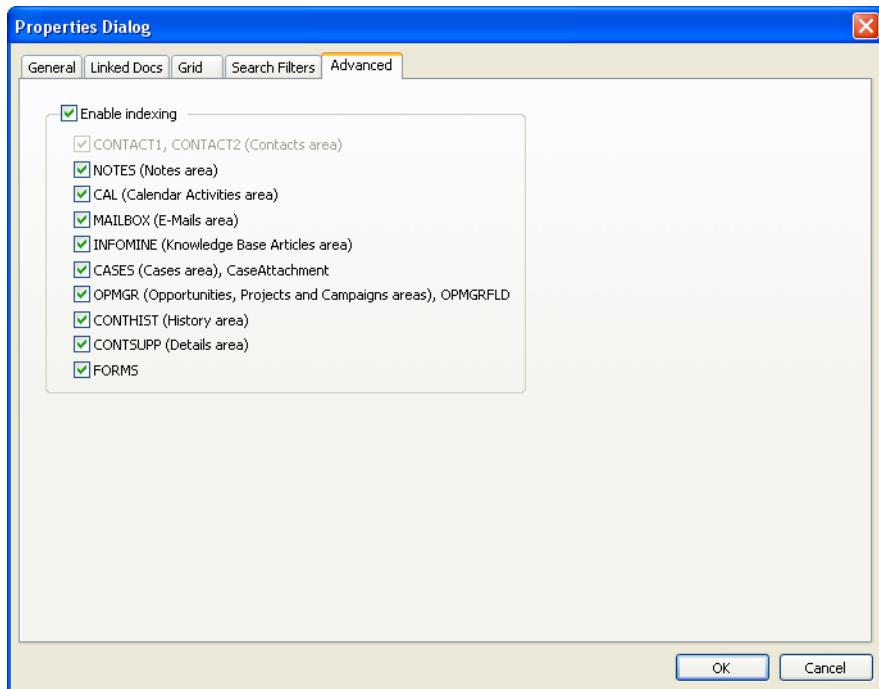
This property page (in this case the Advanced tab) is available only for users with master rights.

• **Enable Indexing.** Activate this checkbox to enable Microsoft Full Text Search indexing of the selected tables.

To unselect a table, click on the checkbox next to it and the checkmark will disappear. To reselect, click on the checkbox again.

> **NOTE:** When you enable indexing, all the areas are automatically selected. To unselect an area, click on the checkbox next to it and the checkmark will disappear. To reselect, click on the checkbox again.

Format of Queries and Results of Searches

The following search query formats are supported in Universal Search, and intended for advanced users.

General Format

The following format is supported:

< For whom > (From where - wps) search criteria

Where:

<For whom> is the contact(s) for which you want to find information.

(from where - wps) is a Universal Search filter, other than a Contacts area filter, from where you want to search.

Search criteria is any word(s) you want to use in the search.

You do not need to complete all parts of this query. For example, if you complete only <For whom>, this will return information that shows only contacts. If you complete only (wps), this will return data from filters. If you complete only search criteria, this will return data for all areas.

Examples

The following are examples where the words calls, emails, and cars are Universal Search filters.

<Art Bar*> (calls)

This query returns all calls to contacts that contain *Art Bar**.

> **NOTE:** To return calls only from *Art Bardtoll*, use the **<For Whom> format.**

Art Bar* (calls)

This query returns all *calls* that contain *Art Bar**

<Art Bar*> (calls emails) California

This query returns all *calls* and *emails* with the word *California* for contacts that contain *Art Bar**

<Cars> California

This query returns all records containing the word *California* from contacts containing the word *car.*

California

This query returns all indexed objects where that contain the word *California.*

<For Whom> format

The <For Whom> format enables you to search on a particular contact or other person. The following are examples using this format:

<c:"Contact Name"> This query returns information only for the selected contact.

<f:"USER\FILTER">. This query returns information only for selected contact filters (for example - <f:"EVGENY\CA">)

<g:"USER\GROUP">. This query returns information only for selected groups (for example - <g:"EVGENY\Group1">)

> **NOTE:** Searches are not case-sensitive.

> **NOTE:** It is safe to use quotes (") at all times. However the format it would be to use quotes when there is a space.

You can use all different words in this form as well. For example:

> **< CA test >.** This returns all contacts that contain words *CA* and *test*.

> **< CA or test >.** This returns all contacts that contain either *CA* or *test*.

(From where wps) format

The (From where) format enables you to search using a Universal Search filter.

The following are examples where the words notes and e-mails are the names of Universal Search filters that return notes records and e-mail messages respectively.

Examples

(notes) birthday. This returns all notes where the word *birthday* occurs.

(notes e-mails) birthday.This returns all notes and emails where the word *birthday* occurs.

(notes). This returns all notes.

<Art Bardtoll> (Notes) - This returns all of Art Bardtoll's notes.

Search criteria format

The Search criteria format enables you to search on words.

Word1 [and|or] [Word2]…

Examples -

test. This returns all objects that contain the word test.

cat or dog. This returns all objects that contain the word cat or dog are returned

cat dog. This returns all objects that contain the words cat and dog.

cat*. This returns all objects that contain a word which begins with cat.

Memo Filters

A Memo filter allows combining multiple search parameters into a single filter. It is helpful when you have to run the same query many times. It also can reduce the length of a query, by substituting one word for many.

A *Memo filter* saves a particular search and is helpful when you have to run the same query many times. It also reduced the length of a query, by allowing you to substitute one word for many words.

The Memo filter name always begins with the exclamation **(!)** sign. The search parameters are entered in the expression field.

Example

You often perform these queries:

<Art Bar*> (calls emails) word1

<Art Bar*> (calls emails) word2

So you create a memo filter called *!Artact* for the expression *<Art Bar*> (calls emails):*

!Artact word1

!Artact word2

Configuring the Contact Search Center

Configure the tab using the Lookup tab in User Options. For more information, see "Setting Options for the Lookup Tab" on page 51.

Using Filters, Queries, and Groups

About Filters and Groups

To create a subset for longer-term use, build a filter or group. Both options create subsets based on selected criteria, but differ in how they handle these subsets.

Filters

GoldMine's filters are based on Boolean expressions (logical statements that have 2 possible outcomes: true or false). When activating a filter, the entire database evaluates based on the Boolean expression. The contact records matching the Boolean expression are selected. The filter ignores records that do not match.

Example

For a project or campaign, you decide to work with your corporate clients located in Los Angeles. You create this Boolean expression:

Contact1->City= "Los Angeles"

A Boolean expression consists of 2 parts: operators and operands. Operands act as the data to be evaluated, while the operator determines the comparison method deciding whether the statement is true or false. In the example, the operands are City and Los Angeles and are equal to the operator.

When this filter is activated, pressing PAGE UP and PAGE DOWN displays only those contact records in the database that are evaluated as true for this statement. The filter evaluates each contact record. If the record does not meet the condition(s) of the statement, GoldMine continues to the next record and repeats the process to find a contact record that does meet the conditions. GoldMine then selects the record. The filter shrinks your database to present a subset of only those contacts with addresses in Los Angeles.

By constructing Boolean expressions, build and maintain an unlimited number of filters to categorize the records in your database.

To Access Filters

1. Select **Tools>>Filters.**

   The Filters and Groups window opens.

2. Select the **Filters** tab.

3. At the **View Filters** drop-down list, select a user name. Each filter associated with that user name lists alphabetically by the **Filter Name** assigned when it was created. **Activate, Release, Delete,** or create a **New filter**.

Creating Filters

GoldMine contains a filter generator that builds a search expression based on menu and browse window selections. Filters operate on the entire database.

For all procedures related to creating and using filters, see the *GoldMine 8.5 Administrators Guide*.

Groups

A group is a fixed set of records that meets a specified set of conditions and allows instantaneous access to member records.

To access Groups:

1. Select **Tools>>Filters.** The Filters and Groups dialog box appears.

2. Select the **Groups** tab.

The upper pane lists the groups owned by the user. The lower pane lists members of the group highlighted in the upper pane. GoldMine orders member records by the Sort code, defined while building the group.

How Groups Differ from Filters

Working with groups can be more efficient than applying a filter. When you activate a filter, GoldMine searches through the database for contact records meeting the criteria.

Once a group is created, membership is fixed and you can work with the group members without performing the search again.

Each member contact record remains in the group until removed. However, since each record evaluates when the filter is activated, a selected filter displays new contact records added to the database if they match the filter's criteria.

Groups also have optional sort capabilities, letting you list member records in the order best fitting your needs.

Group Members Local Menu

1. To access the **group members local menu**, at the Filters and Groups tab, right-click in the **Groups tab>>Member area**.

```
Sort Members...

Sync Contact
View               ▶

Find...
Output to          ▶

New...

Delete...
Edit...
```
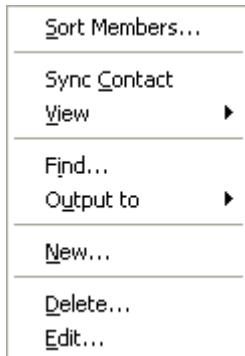
2. Select one of the options:

- **Sort Members.** Opens the Sort Group Members dialog box; sort group members by clearing all sorting options or sort by field, by an expression, or a reference expression.
- **Sync Contact.** Displays the selected group member's contact record as the active contact.
- **View.** Changes the display from company to contact, or both.
- **Find.** Searches within the group for the specified contact.
- **Output to.** Sends the list of group members to the printer, Word, Excel, or the clipboard.
- **New.** Displays the Group Member Profile dialog box where you add the current contact to the group with the reference you type or select.
- **Delete.** Removes a member from the group.
- **Edit.** Displays the Group Member Profile dialog box so you can change the reference or sort for a member.

Using the Groups Tab

Use the Groups tab to create and activate static groups of contacts.

1. Select **Tools>>Filters.**

    The **Filters and Groups** dialog box opens.

2. At the Filters and Groups dialog box, click the **Groups** tab.

3. Right-click in the group tab and select New.

    The **New Group** dialog box opens.

4. Type or select a name in the **Name** field.

    - Type or select the code in the **Code** field.

    - Select another user in the **User** field.

    - Select the following options as needed:

        - **Group Name.** Assign a descriptive name to each group. Members of the highlighted group displayed in the lower portion.

        - **Code.** An optional identification code assigned to each group to help locate a group if you defined many in GoldMine.

        - Click **Build the Group** and/or the **Synchronize** button as needed.

5. The **Group Building Wizard** opens.

Group Building Wizard

In the Group Building Wizard, select one option and click **Next:**

- **Filtered records.** Uses an existing filter created by any user. The Build a Group based on a Filter dialog box opens. See "Groups Based on Filtered Records" on page 131.

- **Previewed records.** Uses records you are previewing in the Preview tab in the Filters and Groups dialog box to preview filter results. The Optional Settings dialog box appears. See the *GoldMine 8.5 Administration Guide* for more information.

- **SQL Query records.** Uses an existing SQL query on the SQL Query tab of the Filters and Groups dialog box to query an MSSQL Server database. The Optional Settings dialog box appears.

- **Tagged records.** Uses records you tagged in the Contact Search Center using **CTRL+click.** Once multiple contacts are highlighted, select **GoTo>>Contact Groups** and create a new group. The Optional Settings dialog box appears.

- **Scheduled calendar activities.** Creates a group based on scheduled activities in the Calendar. The **Group Based on Scheduled Activities dialog box** opens.

- **Completed history activities.** Creates a group based on historical activities. Select a User. Enter the date range and type an Activity code (the default is blank). Select an Activity Type. The **Build a Group based on Completed Activities** dialog box opens.

- **Supplemental contact data.** Creates a group based on detail records, linked documents, additional contacts, or referrals to build a group based on supplemental data. The **Build a Group** based on Contact Details dialog box opens.

Groups Based on Filtered Records

1. In the **Group Building Wizard**, select **Filtered records**.
2. Click **Next.**
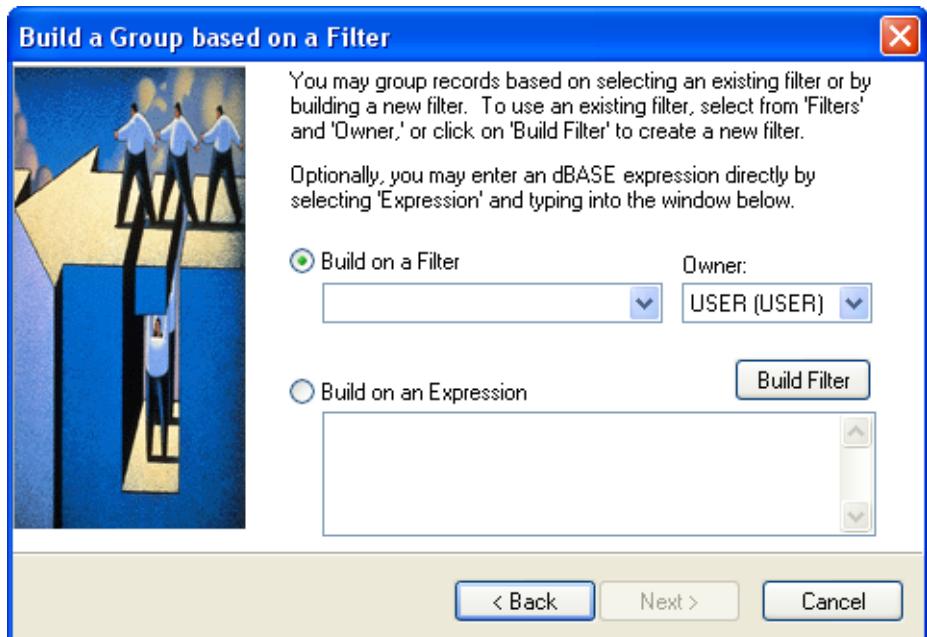
3. At the **Build a Group based on Filtered Records** dialog box, select one option:

   • **Build on a Filter.** Create a group based on an existing filter. Select the filter **Owner** in the drop-down list and the filter name in the Build on a Filter drop-down list.

   • **Build Filter.** Create a filter if one does not exist.

   • **Build on an Expression.** Type a new filter expression or edit the filter expression.

4. Click **Next.**
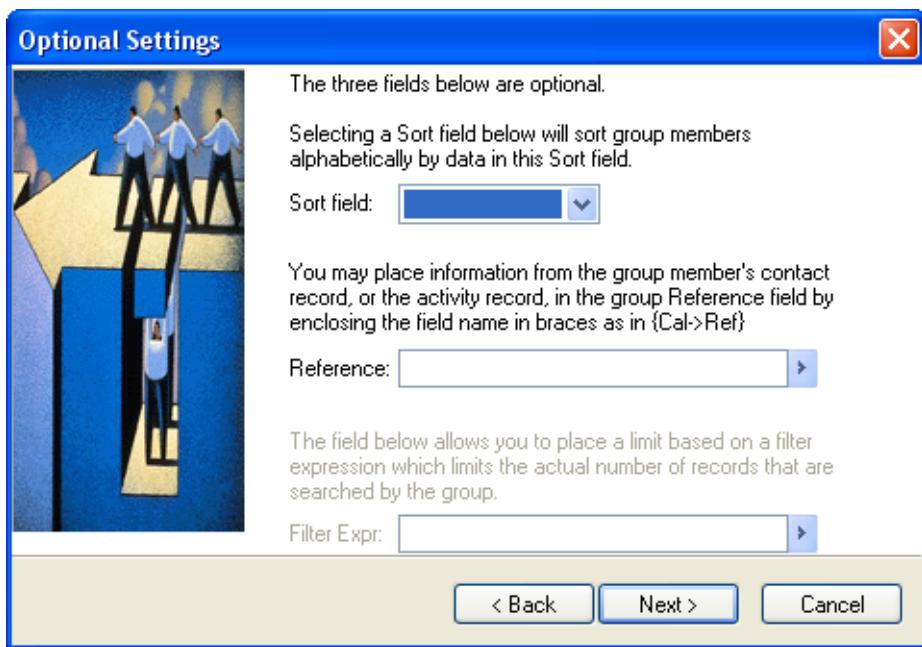
5. The Optional Settings dialog box opens.

   See "Group Optional Settings" on page 133.

Group Optional Settings

When building a group, use the **Optional Settings** to refine your choices.

1. At the Optional Settings dialog box, select the **Sort Field** in the drop-down list.

    The Sort Field specifies a contact field or user-defined field GoldMine sorts the group by. Select the field to sort the group by, and GoldMine places the value from that field in the group Sort field for each group member's contact record. When the group is active, group members are arranged alphabetically by this sort field.

2. Type or select the **Reference** value from the F2 Lookup list.

    Each member has a group Reference field. The field contains information you type or select. When GoldMine builds a group, you can select the value placed in the group Reference field for each group member, for example, {Database->Fieldname}.

3. Type or select a Filter Expr. from the F2 Lookup list. The filter expression must be a valid dBASE Boolean expression.

    This option is not available of you are creating a group based on filtered records.

4. Click **Next.**

5. At the Ready to Build dialog box click Finish.

    The GoldMine Process Monitor opens and displays the status of the building process until it is completed. It then displays the number of records added to the group.

When the group is built, the name is added to the **Group Name** box on the **Groups** tab.

Group Based on Scheduled Activities

1. In the Group Building Wizard, select **Scheduled calendar activities** and click **Next.**

2. At the Build a Group based on Scheduled Activitie**s** dialog box, in the **Range** area, select:
   - **User.** Select the user in the drop-down list.
   - **From Date.** Type or select the date from the F2 graphical calendar.
   - **To Date.** Type or select the date from the F2 graphical calendar.
   - **Activity.** Type the activity code.

3. In the Activity Type area, select **All Activities** or a specific activity.

4. Click **Next** and complete the Optional Settings dialog box opens. See "Group Optional Settings" on page 133.

Group Based on Completed Activities

1. In the Group Building Wizard, select **Completed history activities** and click **Next.**

2. At the **Build a Group based on Completed Activities** dialog box, in the Range area, select:
   - **User.** Select a user in the drop-down list.
   - **From Date.** Type or select the date from the F2 graphical calendar.
   - **To Date.** Type or select the date from the F2 graphical calendar.
   - **Activity.** Type the activity code.
   - **Result.** Type the result code.

3. In the **Activity Typ**e area, select All Activities or a specific activity.

4. Click **Next** and complete the Optional Settings dialog box opens. See "Group Optional Settings" on page 133.

Building a Group Based on Supplemental Contact Data

1. In the Group Building Wizard, select **Supplemental contact data** and click **Next.**

2. At the Build a Group based on Contact Details dialog book, select an option:

    •   **Details.** Builds the group based on detail records.

    •   **Document Links.** Builds the group based on linked documents.

    •   **Additional Contact.** Builds the group based on other contact records.

    •   **Referrals.** Builds the group based on referral records.

    If you select Details, type or select a value from the F2 Lookup list to limit the detail-based group to a particular detail, for example, email address. This option is not available with the other options.

3. Type or select the Keyword in the F2 Lookup list. This option specifies a word or phrase to be searched within the Reference field in the select supplemental data.

4. Click **Next** and complete the Optional Settings dialog box appears. See "Group Optional Settings" on page 133.

Saving Search Results as a Group

1. After creating a search, save the results as a group by clicking **Save.**

    The Save menu appears.

2. Select **Only Tagged Records t**o save only tagged records in the new group, or **All Listed Records** to save the entire list of records.

3. Select **Save as Group.**

    The Group Profile dialog box opens.

4. Type a name in the **Group Name** field.

5. In the **Code** text box, type or select a code from the F2 Lookup list.

6. Select a group owner from the **User** drop-down list.

7. Click **OK.**

    The results are saved and the group name appears below the selected user's groups in the Groups tab of Filters and Groups.

Using Filters and Groups

When you have a large number of contact records in your database, create subsets based on criteria to categorize groups of records to access for special activities.

Example:

- Create a subset of contacts you telephoned in the past week, and send a mass mailing only to those contacts.

- Create and manage subsets of data using filters and groups and the **Filters and Groups** dialog box, or in the Contact Search Center, where you can build and save search criteria as Filters, or search results as Groups.

To Create a Filter for Groups

1. Select **Tools>>Filters.**

    The **Filters and Groups** dialog box appears.

2. Click a tab:
    - **Filters.** Create and delete filters. Also activate and release filters. See "Creating Filters" on page 128.
    - **Preview.** Preview filter results. See the *GoldMine 8.5 Administration Guide* for more information.
    - **Group.** Build groups and review members. Also activate and release groups. See "Groups" on page 128.
    - **SQL Query.** Write and save a SQL query from scratch or using the Lookup wizard. See the *GoldMine 8.5 Administration Guide* for more information.

Activating and Releasing Filters

Use created filter expressions in an operation such as performing a global replace based on a filter. While the filter is active, the filter name becomes part of the contact record window title.

The Contact Search Center still lets you locate and display a record that does not meet filter criteria. When selecting the Next Record (PAGE DOWN) or Previous Record (PAGE UP), the next record displayed meets the filter criteria.

Use the following procedure to activate a filter. Note that activating the filter affects the following GoldMine operations:

1. PAGE UP and PAGE DOWN and corresponding menu commands, Next Record and Previous Record

2. Merge Forms command

3. Record deletion commands: Delete Old History of ALL contact records and Delete ALL contact records

4. Global Replace commands

5. Synchronize commands

6. Export contact records command

To Activate a Filter

Navigate to **Tools>>Filters.** The **Filters and Groups** dialog box opens.
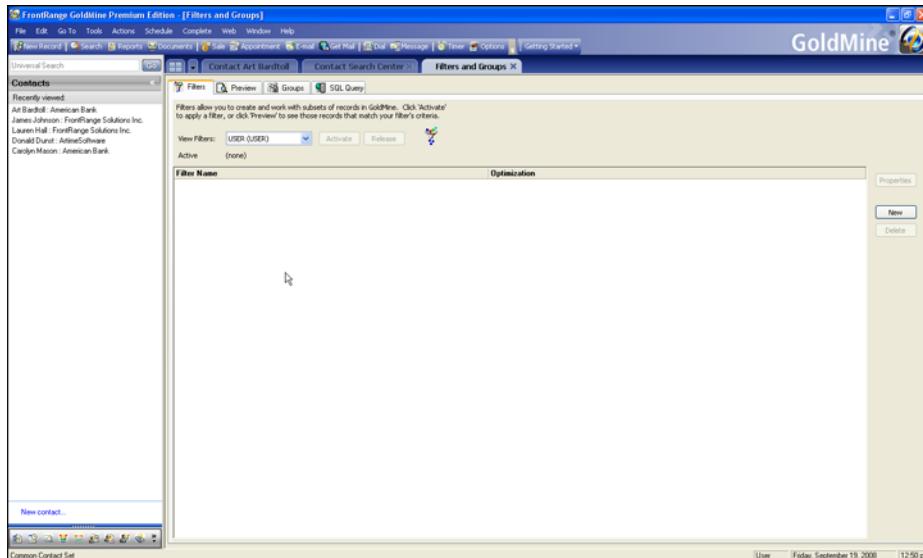
On the **Filters** tab, highlight a filter and click **Activate.** The active filter name appears in the contact record title bar. The filter remains active until released.

To Release a Filter

On the **Filters tab,** highlight a filter and click **Release.** The filter is deactivated and you can now access the entire database.

Activating and Releasing Groups

When selecting this command, GoldMine's database opens containing only contact records that are members of the group. After you build a group, it must be activated before it can be used in an operation.

Create, activate, and release groups in the Contact Search Center.

Use the following procedure to activate a Group

1. Select **Tools>>Filters.**
2. At the **Filters and Groups** dialog box, click the **Groups** tab.
3. Highlight a group and click **Activate**.

Use the following procedure to release a Group

1. Select **Tools>>Filters.**
2. At the **Filters and Groups** dialog box, click the **Groups** tab.
3. Highlight a group and click **Release.**

Activities

About Activities

An **activity** is a time-specific or event-based action linked to a contact.

You can schedule, view, and complete activities. Activities scheduled for a future date and time store as records in GoldMine's Calendar. Information about completed calls, appointments kept, and messages received transfers from the Calendar and the related contact's Pending tab to the History tab, where it stores as a completed activity record.

View activities for users, user groups, for a particular date, or for a contact. Use the Calendar to view activities by date, the Activity List to view by activity type, and the Pending tab on the contact record to view the contact's activities for the contact.

Each activity record, whether still pending on the Calendar or completed in the history file, is linked to a contact record. Connecting activities to contacts establishes a relational link to track the progress of customer relationships.

Benefits of Using Activities

- **Track pending activities.** List activities that need to be performed. Control the scope of these listings; they can be daily, weekly, or monthly. View activities pending for a contact or view only those calls that must be made on a specific day. Also view pending activities of other users.

- **Set up reminders.** Remind yourself about important activities. Alarms can be set for activities GoldMine supports.

- **Record an electronic paper trail.** When activities are completed, GoldMine maintains a record of what was done, when it was done, and by whom—providing powerful information for subsequent follow-up with contacts.

- **Schedule meetings.** When your activities are scheduled in GoldMine, other GoldMine users can determine the times you are available for meetings, conference calls, or appointments.

- **Delegate.** Use the Calendar to assign scheduled activities to others and track their progress.

- **Link activities with your contacts.** Create linked activities and unlinked activities. Linked activities associate with a contact record. By default, created activities link to the active contact record. GoldMine updates the information on a linked contact record to show the progress of these activities. When scheduling an activity not linked to a contact, clear the Link to selected contact option to remove the active contact's name from the Contact field.

    Unlinked activities are not connected to any contact and are generally used for incidental events. We recommend use of unlinked activities be limited, since many of GoldMine's features will not operate when the activity is not linked to a contact record.

View Window (Activities)

A fully navigable browser of Scheduled Activities appears in the view window. Browse to an activity, mailbox, occasion listing, or holiday listing to highlight it in the main window.

Note that settings in the Show menu on the main window of the Activity List will effect what information is available to view.

Scheduling and Completing Activities

Activities are time-specific or event-based actions linked to contacts (calls, appointments, letters) or other types of activities (To Do tasks or events assigned to users). GoldMine is designed to link contacts with scheduled activities which lets you schedule the activity on your calendar and on the contact's Pending tab. When you complete the activity, it is moved to the contact's History tab, creating a record of communication and activity.

About Scheduling Activities

You can schedule activities using one of the following methods:

- The Calendar
- The Pending Tab
- The Schedule Menu

You can schedule the following activities:

- Call
- Next Action
- Appointment
- Literature Request
- Forecasted Sale
- Other Action
- To-Do
- Event

Use the Schedule dialog box for Calls, Next Actions, Appointments, Other Actions, and Events to configure:

- **Detail.** Schedule Activity details. See "Scheduling Activity Details" on page 145.
- **Users.** Schedule users to the activity. See "Scheduling Activities to Users" on page 147.
- **Resources.** Company resources you can schedule to the activity. See "Scheduling Activities with Resources" on page 147.
- **Free/Busy.** Available time of the scheduled users. See "Scheduling Activities Based on Available Times" on page 148.

- **Recurring.** Schedule the activity to occur on a regular basis. See "Scheduling Recurring Activities" on page 149.

- **Series.** Schedule the activity to a group of contacts. See "Scheduling Activities Based on Series" on page 151.

- **GoldAlarm.** GoldAlarm can run and notify you of scheduled activities even when GoldMine is not open on your computer. See "About GoldAlarm" on page 161.

Scheduling Activities

Use the following procedure to schedule all of your activities.

You will notice that when you select an activity, the *Schedule* dialog box reflects that activity. So if you schedule a call, the Schedule dialog box title is **Schedule a Call.** If you are schedule a next action, the Schedule dialog box title is **Schedule a Next Action.**

Use the following procedure to schedule an activity."

1. Select **Schedule>><an activity> (such as Call).**
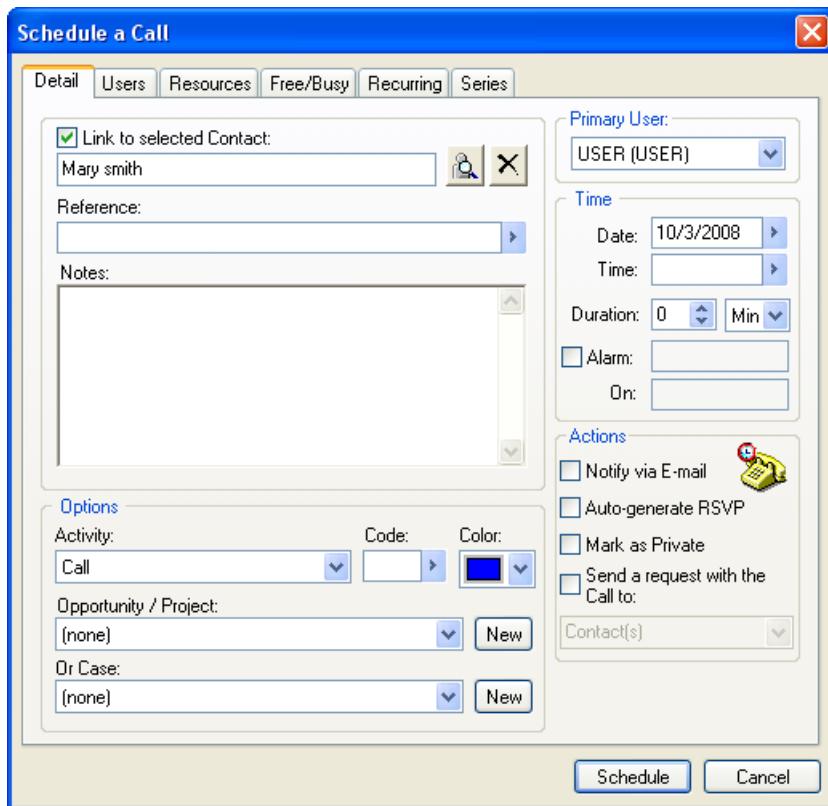
2. At the **Schedule <an activity>dialog box** complete the following tabs.

- **Detail.** Schedule Activity details. See "Scheduling Activity Details" on page 145

- **Users.** Schedule users to the activity. See "Scheduling Activities to Users" on page 147

- **Resources.** Company resources you can schedule to the activity. See "Scheduling Activities with Resources" on page 147.

- **Free/Busy.** Available time of the scheduled users. See "Scheduling Activities Based on Available Times" on page 148

- **Recurring.** Schedule the activity to occur on a regular basis. See "Scheduling Recurring Activities" on page 149

- **Series.** Schedule the activity to a group of contacts. See "Scheduling Activities Based on Series" on page 151.

3. Click **Schedule** to complete scheduling the activity.

Scheduling Activity Details

Use this procedure to schedule Calls, Next Actions, Appointments, Other Actions, and Events.

1. Select **Schedule>>(an activity such as Call).**

2. At the **Schedule (an activity)>> Detail tab**, select the contact(s). To schedule the activity to the current contact and to other contacts, click the search button to the left of the Contact field. Select one option:

• **Select another contact from this record.** List additional contacts for the contact record.

• **Look up another contact.** Launch the Contact Search Center.

• **Select multiple contacts.** Open the Contact(s) & User(s) Selection dialog box.

• **Create a new contact.** Open the New Company and Contact dialog box.

3. In the **Reference** field, type a reference line or select an entry from the F2 Lookup list.

4. In the **Notes** field, type related notes.

   Enhanced text options such as bold, italics, underline, font color, and spell checker are allowed.

   To change settings in the GM.ini file to display all activity Notes as simple text rather than HTML, in the [GoldMine] section type HTML_Cal_Notes=0 to disable the HTML Notes, or contact your system administrator.

5. In the **Options** area, configure:

   • **Activity.** Changes the type of activity to schedule without restarting the process.

   • **Code.** Identifies the activity from the F2 Lookup list.

   • **Opportunity/Project.** Specifies the opportunity or project. Click **New** to create one.

   • **Color.** Specifies the activity color.

   • **Mark as Private.** Makes the activity readable only by the creating user. It is marked (Private) in the contact's Pending tab.

• **Link to selected contact.** Maintains the connection between the activity and the contact. Clearing this option removes the contact's name from the contact text box and does not link to any contact.

6. In the **Primary User** area, select the user or user group to assign the activity to in the drop-down list.

7. In the **Time** area, configure:
   - **Date.** Date of the activity using the F2 graphical calendar.
   - **Time.** Time the activity starts using the F2 graphical clock.
   - **Duration.** Select a Duration increment of **Min** (minutes) or **Hr** (hours) in the right-hand drop-down list, then type or select the time in the left-hand box using the up and down arrows.
   - **Alarm.** Select Alarm to enable notification before the time of the activity. The time the alarm sounds defaults to 10 minutes before the activity. Use the F2 Lookup graphical clock and calendar to set the alarm's time and date.

8. In the **Actions** area, select:
   - **Notify via E-mail.** Sends an e-mail message to the user or users the activity is scheduled for or when the scheduled activity is changed.
   - **Auto-generate RSVP.** Notifies you when the assigned user or users complete the activity.
   - **Send a request with the activity to.** Sends an e-mail notice of the activity to the contacts, users, or both.

9. Click **Schedule** to save and close the dialog box.

Scheduling Activities to Users

Select the Users tab allows delegate the scheduled activity to selected users or user groups.

Use the following procedure to schedule an activity to users.

1. With the contact for which you want to schedule the activity open, select **Schedule.**

   Select one of the Schedule options. The Schedule <an activity >dialog box opens.

2. Click the **Users** tab.

3. To change the **Primary User**, select a user in the drop-down list.

4. To select more users, highlight the user in the **User List** box and click **Select.** The user name displays in the **Selected Users** box. Repeat as necessary.

5. To select user groups, highlight the user group in the **User Group** List box and click **Select.** The members of the group display in the **Selected Users** box. Repeat as necessary.

6. In the **Actions** area, select:

- **Delegate to User(s)** to notify users with a carbon copy (Carbon Copy: used in e-mail messages, memos, and letters) of the scheduled activity

- **Send Bcc: E-mail User(s)** to notify users with a blind carbon copy (Blind Carbon Copy: A copy of a message, usually e-mail, sent to a recipient that the main recipients cannot see.) of the scheduled activity.

- **Send a request with the delegation to** and select **User(s), Contact(s)**, or **Both User(s) & Contact(s).**

7. Click **Schedule** to save and close the dialog box, or click the **Resources tab** to schedule resources.

Scheduling Activities with Resources

When scheduling activities, you can also schedule company resources.

Use the following procedure to schedule an activity with resources.

1. In the **Schedule <an activity>** dialog box, click the **Resources tab**.

2. Double-click a resource in the **Resource List** box.

   The resource is moved to the **Selected Resources** box.

3. Click **Schedule** to save and close the dialog box.

Scheduling Activities Based on Available Times

Before scheduling a meeting for multiple participants, determine a time when all participants are available. Before GoldMine can scan the participants' Calendars to determine their availability, specify attendees and resources.

All potential attendees must maintain their daily schedules in GoldMine and the contact's free/busy times must be configured in GoldMine. After selecting the meeting time, GoldMine schedules the meeting and informs participants.

Use the following procedure to schedule an activity based on available times

1. In the **Schedule <an activity>** dialog box, click the **Free/Busy** tab.

   The busy time pane displays availability of selected users, resources, and the contact.

2. Click **Options** to specify what types of appointments are scanned and your display options. In the **Display** area:

   • If you selected **Show Contacts,** the contact adds to the display.

   • If the Internet free/busy information is not configured or the contact does not publish his or her free/busy information, the contact's busy time displays the message: Internet Free/Busy information is not available, click here for help.

• Use the Add Free/Busy URL dialog box to can add the URL where the contact's free/busy time is published. The URL you add in the dialog box is added to the contact's **Edit>>Record Properties>>Contact Details>>Free/Busy tab.**

3. The **Scan Settings area** initially displays a Start Date, End Date, and Duration. The values in these fields default to the values specified on the Detail tab.

   To expand the busy time display, click on the arrow to display the F2 graphical calendar and select new beginning and ending dates and click and then click **Refresh.**

4. To look for a compatible time, click Find Time scan option,

   • Select dates and the activity duration and click **Find Time.**

   • Scan Settings changes to display the date being scanned and the time. GoldMine scans for a time based on the duration of the activity. The Duration defaults to the duration specified on the Detail tab but can be modified on the Free/Busy tab in to successfully schedule an activity.

5. Select another tab or click **Schedule** to add the activity to the calendar.

Scheduling Recurring Activities

Schedule recurring activities based on any interval of time; for example, schedule a weekly sales meeting for the next 3 months, an appointment on the same day each week over the next 12 weeks, or a reminder to send important clients a birthday card the week before their birthday each year.

Recurring activities can schedule follow-up calls or any type of repeating tasks. They contain the same information as a nonrecurring activity, including alarms and notes.

Important Considerations

- The Hourly scheduling option is unavailable when scheduling forecasted sales.

- Settings defined in the Advanced Recurrence dialog box override settings defined in the Recurring tab of the Schedule dialog box. For example, if the Fixed Frequency is defined as Daily in the Recurring tab, yet you select Monthly in the Advanced Recurrence dialog box, the Monthly selection from the Advanced Recurrence dialog box overrides the Daily selection in Recurring tab.

- GoldMine and Microsoft Outlook do not recognize recurring activities when created in the other application. For example, if a user schedules a recurring activity in Outlook, then synchronizes to GoldMine, GoldMine creates each activity but does not "link" them as instances of a series.

- If a GoldMine user changes or deletes one instance of the series, GoldMine does not prompt the user to change all members of the recurring activity. The same response occurs in Outlook for recurring activities originally scheduled in GoldMine.

To schedule a recurring activity

1. In the Schedule <an activity> dialog box, click the **Recurring tab**.

2. In the **Date Span** area, select:

    • **Start Date.** First date to schedule the recurring activity. When the recurring activity is weekly or biweekly, the day of the week this date falls on is the day of the week all subsequent activities fall on.

    • **End Date.** Last date to schedule a recurring activity. GoldMine only schedules an activity on this date if it falls on the correct day as determined by the schedule frequency. GoldMine does not schedule activities after this date.

3. In the **Fixed Frequency** area, select how often the activity is scheduled, including:

    • Common frequencies from Daily to Yearly.

    • **Every x days.** Manually sets the number of days between activities.

    • **Skip Weekends.** Schedules recurring activities falling on a Saturday or Sunday for the following Monday.

    To schedule a recurring activity sent to Outlook users via Meeting Request, clear Skip Weekends, and use other scheduling options to select the days the activity can occur on. When selected, Outlook only schedules the first instance of the recurring activity and not remaining activities.

4. In the **Monthly Occurrence** area, select a day—as opposed to a date—of the month the activity should fall on such as the first, second, or last week of the month and the specific day of the week on which to schedule the activity.

5. Click **Reset** to returns settings to the original recurring activity parameters.

6. Click **More** to open the Advanced Recurrence dialog box, with additional settings and controls.

    • To have the activity occur on every week or as you need, in the **Repeats** area, click one of the radio buttons.

    • To have the activity weekly on a certain day, in the **By Day of the Week** area, select a day.

7. Click **Schedule** to save and close the dialog box.

Scheduling Activities Based on Series

Use the scheduling Series tab to schedule a series of contacts with any number of contacts.

Use the following procedure to schedule an activity based on a series.

1. In the **Schedule <an activity >** dialog box, click the **Series tab.**

2. Select the **Schedule the activity at the same time for all selected contacts** radio button to schedule the same activity at the same time.

   Select the **Schedule a series of activities with different times for different users** radio button to schedule a series of activities.

3. In the **Time** area, select the following:
   - **Start Date.** Select the start date of the activity.
   - **Daily start time.** Select the start time.
   - **Daily end time.** Select the end time.
   - To skip the weekends, select the **Skip weekends** checkbox.

4. In the **Set activity start times by** area, select:
   - Maximum activities per day. Select the number of activities to schedule per day.
   - **Activity duration.** Select the length of the activity.

5. Select **Wrap up time after each activity** and select the time allowed for activity wrap up.

6. Click **Schedule** to save and close the dialog box.

Auto-Updating Activities

Complete or delete activities for a user while working in the Activity List, the Opportunity tab, Project Pending tab, or the contact's Pending tab. Auto-Update is available on these specific tabs in the Activities List.

- Open
- Alarmed
- Calls
- Appts
- Events
- To-do
- Others
- Actions
- Forecasts

Use the following procedure to auto-update an activity.

1. At the **Activity List or the Pending tab**, right-click in the tab and select **Options>>Auto-Update.**
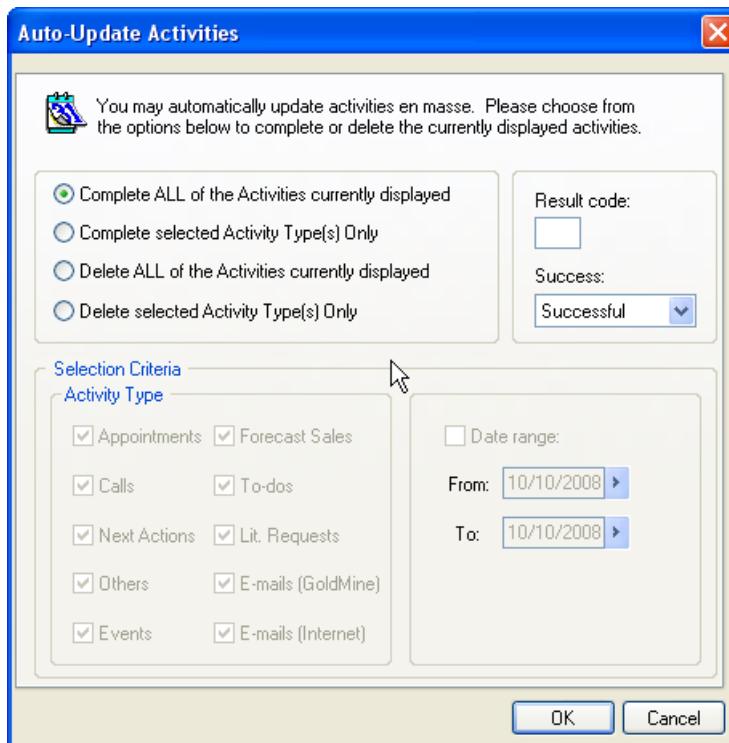
2. At the Auto-Update Activities dialog box, select one of the following options:

- **Complete ALL of the Activities currently displayed.** Completes activities in the current tab and updates the specified Result and Success.

- **Complete selected Activity Type(s) Only.** Completes activities selected in the Activity Type area, the specified Date range, and updates with specified Result and Success.

- In the **Activity Types** area, select the options to process:

  - **Appointments.** Scheduled appointments.

  - **Calls.** Scheduled calls.

  - **Next Actions.** Scheduled next actions.

  - **Others.** Scheduled other activities.

  - **Events.** Scheduled events.

  - **Forecasted Sales.** Scheduled sales.

  - **To-dos.** Associated to-do activities.

  - **Lit. Requests.** Scheduled literature requests.

  - **E-mails (GoldMine).** Pending GoldMine e-mail messages.

  - **E-mails (Internet).** Pending e-mail messages for the Internet.

  - **Delete ALL of the Activities currently displayed.** Deletes activities in the current tab.

  - **Delete selected Activity Type(s) Only.** Deletes activities selected in the Activity Type area based on the specified Date range.

3. Specify a result code and success level for completed activities.

- Type a result code in the Result field.

- Select **Successful** or **Unsuccessful** from the Success drop-down list.

4. If you selected **Complete or Delete selected Activity Type(s) Only,** select Date range, then From and To dates using the F2 graphical calendar.

5. Click **OK.**

Scheduling Literature Requests

Literature options must be configured in the Literature Fulfillment Center before you can add them as a scheduled activity.

For more information on the Literature Fulfillment Center, see "About the Literature Fulfillment Center" on page 236.

Refer to the following example when following the procedure to schedule a literature request.

Example: Schedule a literature request to remind the user to send literature and a cover letter to contacts on a particular day.

1. Select **Schedule>>Literature Request**, or **Actions>>Send Literature Request to Contacts**.
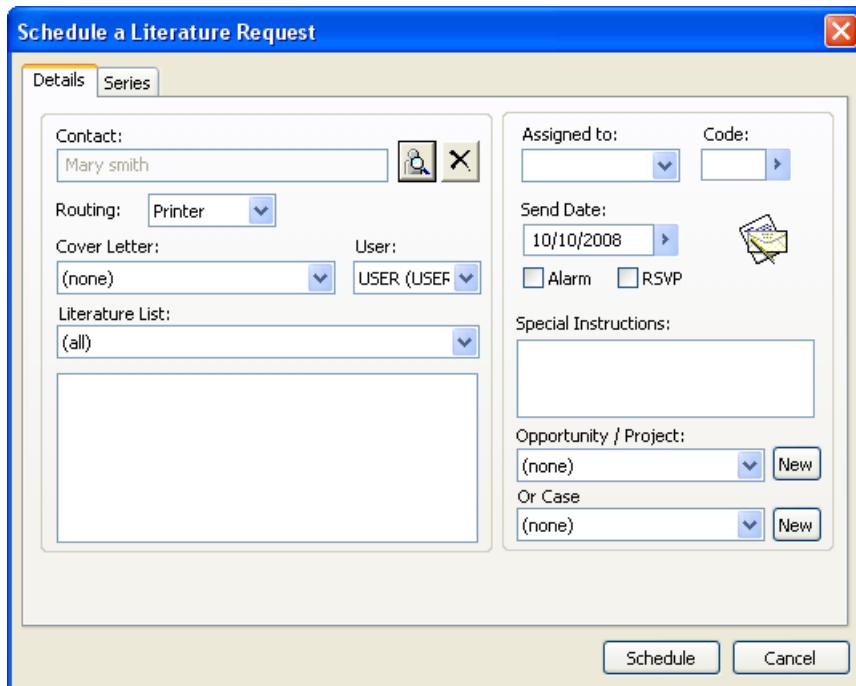
2. At the Schedule a Literature Request dialog box, click the **Detail tab**.

3. Click the **Contact** drop-down arrow to select from additional contacts or click the right-facing arrow to launch the **Contact Search Center** and search for a new contact.

4. At the **Cover Letter** drop-down list, select a cover letter.

The user name displayed in the `User` field determines the templates displayed in the Cover Letter text box. Select **(public)** to see all the templates with an owner of (public).

If you do not need a cover sheet for your request, skip this step.

> **NOTE:** The Cover Letter and User fields are linked to the Document Management Center.

5. At the Literature List drop-down list, select the literature type.

The items included in the list display in the text window below the **Literature List.**

6. To schedule the literature request to a particular user, select the user in the **Assigned** to drop-down list.

The request appears on the assigned user's calendar.

7. At the **Code** field, select the code in the F2 Lookup list to categorize the request.

The activity code can be used to analyze specific completed activities.

8. At the **Send Date** field, select a send date using the F2 Lookup graphical calendar.

9. Select the **Alarm for GoldMine** checkbox to alert the assigned user of the activity before the scheduled time.

10. Select the **RSVP** checkbox to be notified when the assigned user completes the activity.

11. At the **Special Instructions** field, type any instructions to the assigned user.

12. At the Opportunity/Project field, select an opportunity/project o associate the literature request with a particular opportunity or project or click **New** to create a new opportunity or project.

13. Click **Schedule** to complete the process, or select the Series tab to assign the literature request to a group of contacts.

14. For the procedure to complete the **Series tab** see "Scheduling Activities Based on Series" on page 151.

Scheduling Forecasted Sales

A **forecasted sale** is an estimate to record the anticipated close date of a pending sale with one of your contacts. Forecasted sales are different from other activities because they include a product or service, an anticipated sale amount, and the probability of the sale closing.

For more information on scheduling forecasted sales, see "Scheduling Forecasted Sales" on page 248.

About Completing Activities

Use the Complete menu to record any activity you complete, whether scheduled or unscheduled. For example, if a contact calls unexpectedly, make a notation in the history file, even though a call was unscheduled. In this situation, select the type of activity to complete from the Complete menu.

After completing a scheduled activity, the Calendar record is removed and a record is posted to the linked contact's history file indicating what was accomplished.

Complete a scheduled activity from:

- The Contact record's Pending tab
- An Activity List's tabs
- The Calendar
- The Complete menu
- Scheduled Calls
- Unscheduled Calls
- Message
- Next Action
- Appointment
- Sale
- Other Action
- Event
- To-do
- Correspondence

- Letter/Memo
- Literature Request
- Pending Activities
- If more than one than one activity is of the same type, the Complete Activity dialog box appears to select the activity to complete.

> **NOTE:** Configure your Calendar to display completed activities. Right-click to display the local menu, then select Activities, or click the Select Activities button. The Select Activities to View dialog box appears. In the Completed Activities column, select each activity type to display.

Completing Activities

Complete a scheduled or unscheduled activity such as a call, unscheduled calls, message, next action and so on.

Use the following procedure to complete a scheduled activity (such as a call).

1. Access the **Complete** menu by one of these methods:
   - Selecting **Complete>><an activity>** from the toolbar.
   - At the contact's **Pending** tab, the **Activity List**, or the **Calendar,** select the contact record, then right-click on the record and then select **Complete**.
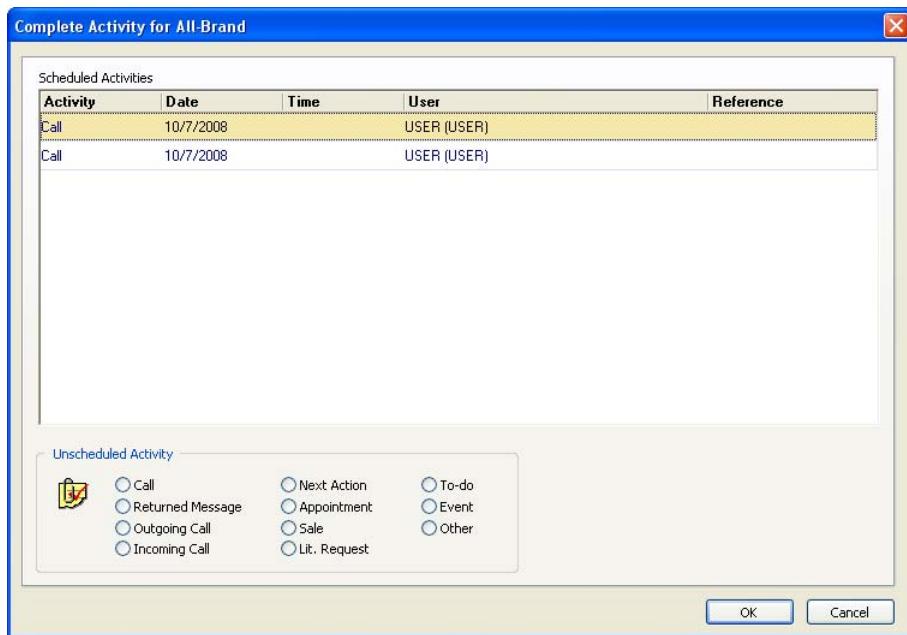
2. At the **Complete Activity for <company>** dialog box, at the **Scheduled Call** area, right-click on the contact record you want.

3. At the Complete the <an activity> dialog box, select and complete the following:

-   **Contact.** The contact record name if the default. If you want to select another user, click the down-arrow and select from the list of users.
-   **Activity.** Select the type of activity you are completing for this scheduled call, for example Call Back, Call-in, Event, and so on.
-   **User.** Select the user completing the call.
-   **Private.** Click this checkbox if the completed activity will be available only to the selected user.
-   **Reference.** Type in or select the reference.
-   **Opportunity/Project.** Select the associated opportunity and/or project in the drop-down list. Click **New** to create a new opportunity
-   **Or Case.** If you are selecting a case instead of an opportunity/project, select the case number. Click New to create a new case.
-   **Code.** Type or select the code from the F2 Lookup list. This is the code to categorize the completed calls by.
-   **Result.** Type or select the result code from the F2 Lookup list. This is a completion code to categorize the outcome of calls by.

You can use result codes to analyze specific completed activities. For example, enter SDM as the result code whenever you send out a demo or sample.

-   **Date.** Select the completion date by clicking the down-arrow and selecting the date in the F2 graphical calendar.
-   **Time.** Select the completion time by clicking the down-arrow and selecting the time in the F2 graphical clock.
-   **Duration.** Type or select the duration of the activity in the F2 Lookup list.
-   **Success.** Select **Successful** or **Unsuccessful** depending on the outcome after the call.
-   **Notes.** Type any notes about this call in the text area.type or append added notes.

    To see the toolbar, click inside the box.

-   **Schedule a Follow-up.** Select this checkbox and then select the type of follow-up, for example, Call, Appoint. Next Action, and so on.

4. Click **OK** to return to the **Complete a Call** dialog box.

Completing Letters and Memos

You can use this procedure to complete a letter or memo on a contact's Pending tab, the Activity List, the Calendar, or the Complete menu.

Use the following procedure to complete a letter or memo.

1. Highlight the document, right-click, and select **Complete,**

    or

    Select **Complete>>Correspondence>>Letter/Memo.**

2. At the Complete a Form dialog box, click the **Contact drop-down arrow** to select from additional contacts or click the right-facing arrow to launch the Contact Search Center and search for a new contact.

3. In the **Activity** drop-down list, select the type of activity you are completing for this correspondence.

4. At the **User** field, select the user completing the correspondence.

5. Select **Private** if the document will be available only to the selected user.

6. Type or select the **Reference**.

7. Select the associated **Opportunity/Project** in the drop-down list.

8. Type or select the **Code** from the F2 Lookup list.

    This is the code by which you categorize the correspondence.

9. Type or select the **Result** code from the F2 Lookup list. This is a completion code by which to categorize the outcome of the correspondence.

> **NOTE:** You can use result codes to analyze specific completed activities. For example, enter SDM as the result code whenever you send out a demo or sample.

10. Select the completion **Date** in the F2 graphical calendar.

11. Select the **Time** in the F2 graphical clock.

12. Type or select the **Duration** in the F2 Lookup list.

13. n the **Success** drop-down list, select **Successful** or **Unsuccessful.**

14. In the **Notes** field, type or append added notes.

15. Select **Schedule a Follow-up** and the type of follow-up, Call, Appt., Next Action, and so on, in the drop-down list and then click OK.

About GoldAlarm

The GoldAlarm runs the alarm options in GoldMine even when you are not logged into the application. When scheduling an activity, you can select the Alarm option.

Configure alarm settings by completing the **User Preferences>>Alarm** tab to pop up a window or post the alarm on the taskbar. For the procedure to set GoldAlarm, see "Setting Options for the Alarms Tab" on page 50.

- **Place GoldAlarm icon on my desktop.** Lets you run the GoldAlarm.exe. The GoldAlarm monitors alarmed activities and notifies you even when GoldMine is closed.

- **Run GoldAlarm when Windows starts.** Runs the GoldAlarm.exe when Windows starts.

When GoldAlarm is running you see a taskbar notice if an activity is due and a GoldMine icon in the System Tray.

About the Activity List

The Activity List displays activities related to a GoldMine user. Use it to view and modify your own activities and view and modify scheduled activities, completed activities, and e-mail for other GoldMine users.

The Activity List contains two sections: the Toolbar and the Main Window.

To open the Activities list, select **Go To>>Activities**, or click the **Activities** button in the Navigation Pane. The Activity List appears.

Browse the Activity List using the browser in the Navigation Pane View Window. Folders include **Open Activities**, **Closed Activities**, and **E-mail**. **Occasion** and **Holiday** scheduling windows are also included. Browse to the desired activity type, mailbox, or scheduling window to populate the table in the main window. Use settings in the Activity List toolbar to further narrow your selection.

- **Holidays.** List holidays selected in the Calendar tab of your User Preferences.

- **Occasions.** List special dates defined in your Calendar.

Activity List Toolbar

When you click on the Activity List tab, the Activity List toolbar appears with the following tools.

Schedule button. This button allows you to schedule your activity. Click on the down-arrow and select the type of action you want. For example, if you want to schedule a call, select Call, or to schedule an appointment, select Appointment. A corresponding popup window where you can select scheduling options appears for each selection.

Show button. This button allows you to select the list of activities you want to view. For example, you can see all activities, or activities for Today or This Week or This Month. Click on the down-arrow to select a view. To see activities within a date range, select Date Range and at the popup window, select the dates.

User button. This button lets you view activities for a user or for the users on a master list. Click the down-arrow to select a User or Master.

Link button. This button allows you to link an activity to a user, roll over an activity to another User or automatically update several activities at one time. Click the down-arrow button to select Link, Rollover or Auto Update.   Select Output to send the Activities List output to a printer, Microsoft Word, or Microsoft Excel. A corresponding popup window where you can select your link or rollover options appears for each selection.

Edit button. This button allows you to edit an activity. For example, you can change the Activity, or the User, or the scheduled Date and Time of the activity. Select an activity and then click the Edit button. A popup window where you can edit your activity appears.

Complete button. This button allows you to view and/or edit a completed task. For example, you might complete a sale but you want to Schedule a Follow-up phone call, or add Notes to the activity. Select the activity and click the Complete button. A popup window where you can add or edit your activity appears.

Activity List Main Window

The Activity List Main Window contains three panes:

Table panel. A table pane displaying activities, which may be sorted and filtered by any of its five columns. Use the drop-down menu at the head of each column to select sort criteria, or select custom to open the Custom Autofilter dialog for the selected column.

Code ▼	Reference ▼	Date ▼	Time ▼	Contact ▼
EUP	need to fax her the latest Van mo	3/5/2007	11:00a	Scott Leonidsky
	UPS Blue	3/8/2007	10:00a	Iain John Conyngsby
MIS	Visit FrontRange Solutions' Home	3/10/2007	10:00a	Lauren Hall

Summary panel. A summary pane at the bottom left of the Activity List Main Window displays Creation, Updated, Contact, Company, Phone, and Extension fields for the selected activity.

Creation: USERNAME (USERNAME); 2/26/2007 at 12:38pm
Updated: USERNAME (USERNAME); 3/6/2007 at 5:19am

Contact: Scott Leonidsky
Company: JHill Millinery
Phone: (216)555-4664 Ext:

Reference panel. A reference pane at the bottom right of the Activity List Main Window displays Reference and Notes fields for the selected activity.

Activity List Options Sub-Menu

The Activity List Options sub-menu consists of the following:

Date Range. Displays a date range submenu. Specify the range of dates to display activities for in the Activity List. See "Activity List Date Range Dialog" on page 164.

User. Displays the **Select a User** dialog box. Select a GoldMine user's activities to view.

Activities. Displays the Select Activities to View dialog box to display activity types. By default, display all scheduled activity types except opportunities and projects. Not available for the Actions tab (only Next Actions).

View. Displays options.

Detailed View. Displays the details of the selected activity display in the lower portion of the Activity List.

Sync Contact. Displays the contact linked to the selected activity in the Activity List.

Show Contact. Displays the name of the contact in the Contact column of the browse window.

Show Company. Displays the name of the company in the Contact column of the browse window.

Link. Displays the links a selected activity to the active Record.

Roll-over. Displays the **Roll over ALL displayed activities** dialog box. Forward activities to another user and/or another date.

Auto-Update. Displays the **Auto-Update Activities** dialog box. Complete or delete multiple activities for a selected user. This option is available only on selected activity tabs.

Filter. Activity Filter dialog box. Define conditions for selecting activity records to display.

Activity List Date Range Dialog

The Activity List displays activities for all dates by default; to select from a broad range of dates, select an option from the Date Range dialog.

All Date. Displays all activities without regard for date.

Date Range. Opens the Activity Date Range dialog box. Options are similar to the menu items.

Today and Prior. Today's activities and past activities.

Yesterday. Yesterday's activities.

Today. Today's activities.

Tomorrow. Tomorrow's activities.

Day After. Day after tomorrow's activities.

This Week. This week's activities.

Next Week. Next week's activities.

Last Week. Last week's activities.

This Month. This month's activities.

Next Month. Next month's activities.

Last Month. Last month's activities.

This Year. This year's activities.

Next 7 Days. Activities scheduled for the next seven days.

Past 7 Days. Activities scheduled for the last seven days.

30 Day Window. Displays the current 30 days.

Using the Activity List

The **Activity List** displays activities as a categorized list. Control actions to perform on activities through the local menus.

Use the following procedure to use the activity list.

1. Select **Go To>>Activities**, or select **Activities** from the Navigation Pane. The **Activity List** appears.

2. Select an activity from the View Window (see) or the browser in the Navigation Pane (see .) The activities are:
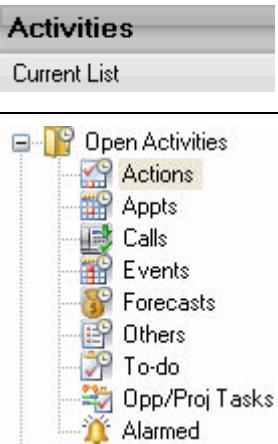
Open Activities: Expand folder and select from the following
- **Actions**: Display open Actions for this user
- **Appts**: Display open Appointments for this user
- **Calls**: Display open Calls for this user
- **Events**: Display open Events for this user
- **Forecasts**: Display open Forecasted Sales for this user
- **Others**: Display open Other Actions for this user
- **To-do**: Display open To-dos for this user
- **Opp/Proj Tasks**: Display open Opportunity and Project tasks for this user
- **Alarmed**: Display all activities with Alarms scheduled for this user
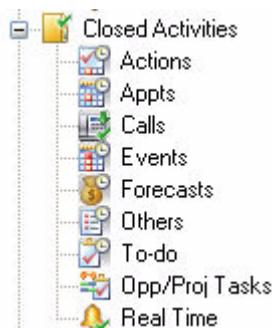
Closed Activities: Expand folder and select from the following	
• **Actions**: Display closed Actions for this user	
• **Appts**: Display closed Appointments for this user	
• **Calls**: Display closed Calls for this user	
• **Events**: Display closed Events for this user	
• **Forecasts**: Display closed Forecasted Sales for this user	
• **Others**: Display closed Other Actions for this user	
• **To-do**: Display closed To-dos for this user	
• **Opp/Proj Tasks**: Display closed Opportunity and Project tasks for this user	
• **Real Time**: Display a chronological listing of activities for this user	

E-mail: Expand Folder and select from the following
- **Inbox**: Display messages in the inbox of the E-mail Center
- **Outbox**: Display messages in the outbox of the E-mail Center
- **Filed**: Display messages that have been previously filed in the E-mail Center

Occasions: Display Occasions set in your Calendar
Holidays: Display Holidays set in your Calendar User Preferences

3. To perform an action, such as completing a call or replying to an e-mail, right-click on an activity in the **Activity List Main window.**

4. At the local menu, select the action.

5. Reverse the sort order of the activities on the screen, click on the column title (the exception is the **Contact** column).

6. Click **X** to close the window.

View Window: Activity List

A fully navigable browser of Scheduled Activities appears in the view window. Browse to an activity, mailbox, occasion listing, or holiday listing to highlight it in the main window. Note that settings in the Show menu on the main window of the Activity List will effect what information is available to view.
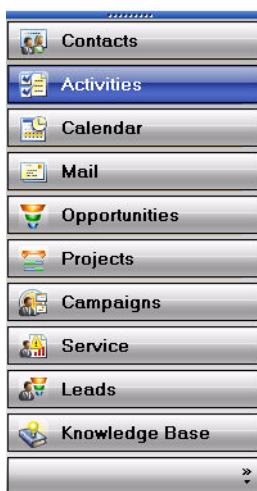
View Scheduled Activity Zoom

Use the Scheduled Activity Zoom to view basic information about an activity and complete or delete the activity.

Use the following procedure to use the Activity Zoom.

1. Right-click an activity and select **Zoom** on the local menu.

2. At the Scheduled Activity Zoom dialog box, select the following:
   - **Activity.** Activity type
   - **Code.** Assigned code
   - **Name.** Linked contact name
   - **Company.** Name of the linked company
   - **Phone.** Phone number
   - **Reference.** Reference assigned to the activity
   - **Alarm.** If Yes, the activity has an alarm
   - **RSVP.** If Yes, an RSVP is required from users
   - **Scheduled.** Primary user and date for the activity's scheduled time
   - **Creation.** The creating user and time created
   - **Updated.** If updated after creation, the updating user and the time of update.
   - **Text area.** Displays other assigned users, resources, and notes

3. To scroll through activities, click **Previous or Next** or click the up and down arrows beside **Previous.**

4. Click **Complete.**

   The Complete Activity dialog box opens.

5. To remove the displayed activity, click **Delete.**

   When confirmed, the activity is deleted without creating a history record.

6. Click **Close.**

Printing Activities

You can print a single activities or all activities for a contact record.

To print all activities

1. Navigate to **GoTo>>Activities.**
2. Right-click on any activity and select **Output to>>Printer>>All entries.**
3. The list of activities opens.
4. Click the **Printer** icon and then click **OK.**

To print a single activity

1. Navigate to **GoTo>>Activities.**
2. Right-click on any activity and select **Output to>>Printer>>Current selection.**
3. The activity report for that selection opens.
4. Click the **Printer** icon and then click **OK.**

To print an activity from the Pending tab

1. At the Contact view, double-click on a contact.
2. At the Contact Detail view, select the Pending tab.
3. Select the activity you want to print.
4. Right-click on any activity and select **Output to>>Printer>>Current selection.**
5. The activity report for that selection opens.
6. To print all activities, select **All entries.**
7. Click the **Printer** icon and then click **OK.**

To print an activity from the Calendar

1. Navigate to **GoTo>>Calendar.**
2. Right-click on the activity you want to print and select **Output to>>Printer>>Current selection.**
3. The activity report for that selection opens.
4. To print all activities, select **All entries.**
5. Click the **Printer** icon and then click **OK.**

Calendars

About the Calendar

The Calendar works as a time management tool. Quickly determine what is scheduled and review available times for new appointments and activities. The Calendar displays day, week, month, year, planner, and outline calendars for a single user or for a group of users. You can launch the calendar and leave it running in the GoldMine work area.

Calendar Toolbar

The Calendar toolbar consists of these buttons. The default values are:

- **Schedule.** Click on this button to access the activities you can schedule from your calendar. The dialog box for the activity opens.

- **Show.** Click on this button to show a particular day or activity. The dialog box for the date or activity opens.

- **User.** Click on this button to select the user of the calendar you want to view. The **Select Users** dialog box opens. Select from the User List or Group List.

- **Today.** Select the date and/or activity you want to view. Select an activity and then select a date or activity. The dialog box for the date or activity opens.

- **Edit.** Select an activity and click this button. Make the changes as needed.

- **Complete.** Select a task and click this button to complete an activity

> **NOTE:** The drop-down buttons (other than Schedule) are 'split' buttons which means the name of the button will change as you make your selections. For example, if you select the **Today** button and then select a menu item, you will see a name of the menu item as the name of the button.

Accessing Your Calendar

The Calendar displays scheduled activities for the selected user or user group. Use the following procedure to open your calendar or a calendar of another user.

1. Select **Go To>>Calendar**

   or

   Select **F7**

   or

   Click **Calendar** on the Navigation Panel.

   Your calendar opens.

2. To see calendars of other users, select the user or user group in the **User** drop-down list.

Using the Calendar

The Calendar displays scheduled activities for the selected user or user group.

Use the following procedure to use your calendar functions.

1. Select **Go To>>Calendar** or select F7, or click **Calendar** on the Navigation Panel.

   Your Calendar appears.

   • To see calendars of other users, select the user or user group in the User drop-down list.

2. To change your view, click a tab:

   • **Day.** See "Using the Daily Calendar" on page 174.
   • **Week.** See "Using the Weekly Calendar" on page 175
   • **Month.** See "Using the Monthly Calendar" on page 176
   • **Year.** See "Using the Yearly Calendar" on page 177
   • **Planner.** See "Using the Planner Calendar" on page 178
   • **Outline.** See "Using the Outline Calendar" on page 179
   • **Peg Board.** See "Using the Peg Board" on page 180

3. Click the toolbar options to schedule and complete activities, move through the calendar, set the display, delete and edit the scheduled activities.

4. Right-click and select the local menu options to manage specific activities, synchronize and set the output to options, change users, and access other options.

Using the Daily Calendar

The calendar is user-based, letting you see your scheduled activities and quickly determine available times when scheduling for yourself or up to 16 other users.

Use the following procedure to use your daily calendar.

1. Select **Go To>>Calendar**.

2. At your calendar, click on the **Day** tab at the bottom of the window.

   Your daily calendar opens displaying today's date.

   To see another date, click the arrows in the top right corner of the window to display the date you want.

3. To see other calendars, click the **User** drop-down to select the user for whom you want to view activities.

   • Select the name in the drop-down User list, or select (Multiple Users) to open the Select Users dialog box.

   • Double-click the user in the User List box or user group in the Group List box to add to the Selected Users list. Click OK to close the Select Users list.

4. Click the local menu to manage the activities.

   Right-click and select a local menu option.

5. To change the day displayed, click the Today button on the Calendar toolbar.

   The calendar view refreshes and the page for today displays.

6. Click the tabs to access:

   • **Week.** Displays the week, Sunday through Saturday.

   • **Month**. Displays the month.

   • **Year.** Displays the entire year with scheduled days highlighted.

   • **Planner.** Activities of the selected user for today and the next 22 days.

   • **Outline.** Scheduled activities in a hierarchical tree structure, with branches that correspond to years, months, and days.

   • **Peg Board.** Login status and activity of individual users and system availability.

Using the Weekly Calendar

The Week tab displays the week, Sunday through Saturday.

1. Select **Go To>>Calendar**. Your Calendar appears.

2. Click on the **Week** tab you can select the users activities to display.

   • Select the name in the drop-down **User** list, or select (Multiple Users) to open the Select Users dialog box.

   • Double-click the user in the **User** List box or user group in the Group List box to add to the Selected Users list. Click **OK** to close the Select Users list.

3. Use the local menu to manage the activities. Right-click and select a local menu option.

4. To change the day displayed, click the **Today** button on the Calendar toolbar.

5. Click the tabs to access:

   • **Day.** Activities scheduled for the day.

   • **Month.** Displays the month.

   • **Year.** Displays the entire year with scheduled days highlighted.

   • **Planner.** Activities of the selected user for today and the next 22 days.

   • **Outline.** Scheduled activities in a hierarchical tree structure, with branches that correspond to years, months, and days.

   • **Peg Board.** Login status and activity of individual users and system availability.

Using the Monthly Calendar

The Month tab displays schedule-related information for the month.

1. Select **Go To>>Calendar**. Your Calendar appears.

2. Click on the **Month** tab you can select the users activities to display.

    *   Select the name in the drop-down **User** list, or select (Multiple Users) to open the Select Users dialog box.

    *   Double-click the user in the **User** List box or user group in the Group List box to add to the Selected Users list. Click **OK** to close the Select Users list.

3. Use the local menu to manage the activities. Right-click and select one local menu option.

4. To change the day displayed, click the **Today** button on the Calendar toolbar.

5. Click the tabs to access:

    *   **Day.** Activities scheduled for the day.

    *   **Month.** Displays the month.

    *   **Year.** Displays the entire year with scheduled days highlighted.

    *   **Planner.** Activities of the selected user for today and the next 22 days.

    *   **Outline.** Scheduled activities in a hierarchical tree structure, with branches that correspond to years, months, and days.

    *   **Peg Board.** Login status and activity of individual users and system availability.

Using the Yearly Calendar

The Year tab displays schedule-related information for the month.

1. Select **Go To>>Calendar**. Your Calendar appears.

2. Click on the **Year** tab you can select the users activities to display.

   - Select the name in the drop-down **User** list, or select (Multiple Users) to open the Select Users dialog box.

   - Double-click the user in the **User** List box or user group in the Group List box to add to the Selected Users list. Click **OK** to close the Select Users list.

3. Use the local menu to manage the activities. Right-click and select one local menu option.

4. To change the day displayed, click the **Today** button on the Calendar toolbar.

5. Click the tabs to access:

   - **Day.** Activities scheduled for the day.

   - **Month.** Displays the month.

   - **Year.** Displays the entire year with scheduled days highlighted.

   - **Planner.** Activities of the selected user for today and the next 22 days.

   - **Outline.** Scheduled activities in a hierarchical tree structure, with branches that correspond to years, months, and days.

   - **Peg Board.** Login status and activity of individual users and system availability.

Using the Planner Calendar

When you are scheduling activities for others, you can use the Planner to view their schedules. Each users activities are represented by a colored bar showing the amount of time reserved for the activity.

By default, the Planner tab displays the activities of the currently logged in user for 22 days from the current date.

1. Select **Go To>>Calendar**. Your Calendar appears.

2. Click on the **Planner** tab you can select the users activities to display.
   - Select the name in the drop-down **User** list, or select (Multiple Users) to open the Select Users dialog box.
   - Double-click the user in the **User** List box or user group in the Group List box to add to the Selected Users list. Click **OK** to close the Select Users list.

3. Use the local menu to manage the activities. Right-click and select one local menu option.

4. To change the day displayed, click the **Today** button on the Calendar toolbar.

5. Click the tabs to access:
   - **Day.** Activities scheduled for the day.
   - **Month.** Displays the month.
   - **Year.** Displays the entire year with scheduled days highlighted.
   - **Planner.** Activities of the selected user for today and the next 22 days.
   - **Outline.** Scheduled activities in a hierarchical tree structure, with branches that correspond to years, months, and days.
   - **Peg Board.** Login status and activity of individual users and system availability.

Using the Outline Calendar

The Outline tab displays your scheduled activities in a hierarchical tree structure with branches corresponding to years, months, and days.

1. Select **Go To>>Calendar**. Your Calendar appears.

2. Click on the **Outline** tab you can select the users activities to display.

   - Select the name in the drop-down **User** list, or select (Multiple Users) to open the Select Users dialog box.

   - Double-click the user in the **User** List box or user group in the Group List box to add to the Selected Users list. Click **OK** to close the Select Users list.

3. Use the local menu to manage the activities. Right-click and select one local menu option.

4. To change the day displayed, click the **Today** button on the Calendar toolbar.

5. At the tree display:

   - **Year**. As the highest level in the hierarchy, a year contains all activities grouped by months. To display the months associated with the year, double-click the year.

   - **Month.** Depending on whether you selected Show Word Days Only on the local menu Options area, each month displays all calendar dates or only your working days for the month. All specified dates appear regardless of whether activities are scheduled. To display individual dates in a month, double-click the month.

   - **Date.** Each date lists all scheduled activities. The associated user displays if you display more than one user's calendar. To display the activities, double-click the date.

   > **NOTE:** To display all the listings under a year or month, select Options>>Expand All from the local menu.

6. Click the tabs to access:

   - **Day.** Activities scheduled for the day.
   - **Month.** Displays the month.
   - **Year.** Displays the entire year with scheduled days highlighted.

- **Planner.** Activities of the selected user for today and the next 22 days.
- **Outline.** Scheduled activities in a hierarchical tree structure, with branches that correspond to years, months, and days.
- **Peg Board.** Login status and activity of individual users and system availability.

Using the Peg Board

The Peg Board displays the login status and activity of individual users. For the users, the Peg Board tracks the login and logout times, total logged time, and keyboard and mouse-click activity.

1. Select **Go To>>Calendar**. Your Calendar appears.
2. Click the **Peg Board** tab.
3. Use the local menu to manage the activities. Right-click and select one local menu option.

    On the Peg Board, the *tacks* indicate whether a user is currently logged in (green), logged away (yellow), or logged out (red).

4. To post your Whereabouts for others, right-click and select **Log Away.**

    In the **My whereabouts** text box, type or select your whereabouts.

5. In **User Inactivity** area, blue bars indicate the length of time a user is inactive, based on the absence of mouse clicks or keystrokes.

    The Peg Board displays a column indicating when user's systems perform various actions.

    - The gear symbol indicates the user is performing batch processing, such as globally replacing fields or synchronizing.
    - The bell symbol indicates the user logged away but is still logged into GoldMine.
    - The question mark indicates the user terminated without logout.

6. Users with Master Rights can force all users to exit GoldMine to perform maintenance on the system. The forced logout grants users a specified amount of time to save their work before being logged out.

> **NOTE:** A Master user can also force a single user to log out by double-clicking the user's green tack in the Peg Board display.

7. Click the tabs to access:
   - **Day.** Activities scheduled for the day.
   - **Month.** Displays the month.
   - **Year.** Displays the entire year with scheduled days highlighted.
   - **Planner.** Activities of the selected user for today and the next 22 days.
   - **Outline.** Scheduled activities in a hierarchical tree structure, with branches that correspond to years, months, and days.

> **NOTE:** By default, GoldMine periodically updates the Peg Board display beneficial for notebook PCs that use power conservation features that shut down the hard disk. To disable the periodic update feature, enter UpdatePegboard=0 in the [GoldMine] section of Username.ini.

Using the Task List in the Calendar

1. Select **Go To>>Calendar.**

   The **Calendar** window opens.

   The **Task** list displays on the Day, Week, or Planner calendar and displays pending Forecasted Sales, Literature Requests, Events, and To-Do items.

2. Use the local menu to manage tasks. Highlight the item and right-click.
   - **Schedule.** Schedule an activity.
   - **Complete.** Remove task from the Task list and saves it as history.
   - **Reply.** Open an e-mail message addressed to the creator of the task.
   - **E-mail Contact.** Write a new e-mail message to the creator of the task
   - **Delete.** Delete the task from the list.
   - **Edit.** Open the appropriate dialog box for the selected task. Edit the contents.

Using Occasions in the Calendar

Occasions are one-time or recurring events to display on your calendar. Link the occasion to a contact or leave it unlinked. Or set an alarm on the occasion to remind you in advance.

Occasions displayed in the Calendar on the day of creation. View all occasions on the Occasions tab of the Activity List. Occasions are not linked to a contact's until you schedule an activity from the activated GoldMine Occasion Alarm.

• **New.** Adds an occasion.

• **Delete.** Deletes the selected occasion.

• **Edit.** Displays the Edit an Occasion dialog box. Edit the information.

Adding or Editing Occasions

Use the following procedure to add or edit an occasion.

1.   Select an option:

   • On the **Day** or **Week** tab of the Calendar, right-click the **Occasions** list area.

     Select **New** or **Edit.** The Detail tab of the Edit an Occasion dialog box opens.

     or

   • Select **Edit>>Record Properties>>Contact Details.** The Contact Details dialog box opens.

     Select the **Occasions tab** and click **New.** The **Detail** tab of the Edit an Occasion dialog box opens.
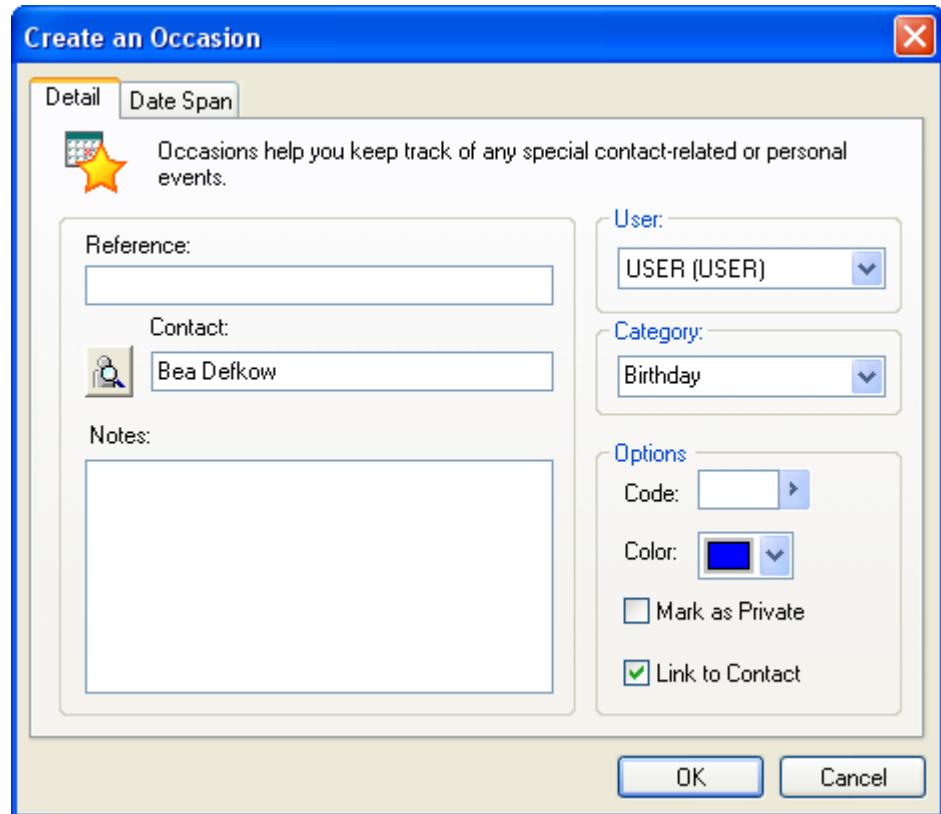
2. Type the occasion name in the **Reference** text box.

3. Click the search button beside the Contact text box. and select one option:

   • **Select another contact from this Record.** Select an additional contact on the current contact record.

   • **Look up another contact.** Opens the Contact Search Center to search for a contact.

   • **Create a new contact.** Opens the New Company and Contact dialog box to create a new contact.

4. Type any notes about the occasion in the **Notes** field.

5. If the occasion is assigned to another user, select from the **User** drop-down list.

6. Select a category, such as birthday, in the **Category** drop-down list.

7. In the **Options** area, configure:

   • **Code.** Select the code in the F2 Lookup list.

- **Color.** Select the calendar display color for the occasion in the drop-down list.
- **Mark as Private.** Select to keep others from seeing the occasion on the Pending tab.
- **Link to Contact.** Select to link the occasion to the contact record and display on the Pending tab.

8. Click the **Date Span** tab.

9. In the **When** area, select the starting Date from the F2 graphical calendar and type or select the number of days in the Duration: x day(s) field.

10. To place an alarm on the occasion, select **Before: x day(s)** and type or select the number of days.

11. In the **Occurs** area, select the frequency of the occasion in th**e Every: x year(s)** field and select one of the following:

12. **By Specific Date.** Select the month and day in the drop-down lists.

13. **By Day of the Week.** Select the week of the month, day of the week, and month in the drop-down lists.

14. Click **OK** to close the window and add the occasion to the calendar.

   Occasions are linked to contacts but not displayed on the contact record until an activity is scheduled from the **GoldMine Occasion Alarm** dialog box appearing at the time specified on the **Date Span** tab.

Deleting an Occasion

1. Select **Edit>>Record Properties>>Contact Details.** The Contact Details dialog box opens.

2. Select the occasion and then click **Delete**.

About Sharing Free/Busy Times

Scheduling becomes more dynamic and efficient when you and your contacts share free/busy times. As a GoldMine user you can publish your free/busy time in an iCalendar recognized format, making it available to non-GoldMine users for easy scheduling and to save time when proposing and counter-proposing meeting times between participants.

GoldMine users can view a contact's published free/busy time in the GoldMine calendar when scheduling an activity.

Shared Free/Busy Times Example

GoldMine's ability to publish and to read calendar data provides efficient collaboration with non-GoldMine users.

The following table displays some scenarios where you may use the various options to improve your ability to work with outside contacts and with users who may not have immediate access to GoldMine:

Action	GoldMine	Outlook
Configuring user free/busy settings	**Tools>>Options>>Calendar>>More Options>>Free/Busy (.ifb)**	**Tools>>Options>>Calendar Options>>Free/Busy Options (.vfb)** See the Outlook online Help for more detailed information.
Initializing user free/busy publishing	*Automatically***:** After the Free/Busy tab is configured, GoldMine begins publishing based on a specified time. *Manually***: Web>>Publish Calendar>>Publish Free/Busy Times.**	**Automatically:** After the Free/Busy Options are configured, Outlook begins publishing based on a specified time.
Reading a contact's published free/busy time	Select contact record and then **Edit>>Record Properties>>Contact Details>>Free/Busy tab (.ifb)**	Select Contact and click the Details tab. Complete the Internet Free-Busy Address.
Scheduling based on free/busy times	Select **Schedule>>Select activity** and configure **Detail**, **Resources**, and **Free/Busy**. Click **Options** and select **Show Contacts**.	In Calendar, select **Actions>>Select activity. Select Attendee Availability>>Invite Others**. Select contact with published free/busy information.

Action	GoldMine	Outlook
Distributing your free/busy URL to others	Copy and paste the URL into an e-mail message to send to a contact.	Add to the Details tab of your Contact record and save as vCard (.vcf). When you send a vCard with your signature, the free/busy URL is included.

Scheduling Based on Free/Busy Times

1. Select **Schedule>><an activity>** and configure **Detail, Resources,** and **Free/Busy** fields.

2. Click **Options** and select **Show Contacts.**

3. In Calendar, select **Actions>>select activity.**

4. Select **Attendee Availability>>Invite Others** and select contact with published free/busy information.

   For more information on free/busy times, see the *GoldMine 8.5 Administrators Guide.*

Distributing Your Free/Busy URL to others

1. Copy and paste the URL into an email message to send to a contact.

2. Add to the **Details tab** of your Contact record and save as vCard (.vcf). When you send a vCard with your signature, the free/busy URL is included

   For more information on free/busy times, see the *GoldMine 8.5 Administrators Guide.*

Setting Free/Busy Times

For GoldMine to read a contact's published free/busy times, you must configure the contact's Contact Details to access the file. After setting the path, you should see the contact's free/busy times when using the **Free/Busy tab** while scheduling an activity.

Use the following procedure to set free/busy times.

1. With the contact record active in GoldMine, select **Edit>>Record Proper-ties>>Contact Details.**

Contact Details

Occasions | Free/Busy | Digital IDs

GoldMine offers you the ability to view your contacts' Free/Busy time so that you can coordinate calls and appointments more effectively.

To check a contact's Free/Busy time when scheduling in GoldMine, you must have access to the contact's currently published Free/Busy information.

Contact's name: Bea Defkow

Free/Busy URL: file:// [text box] [...]

Username:

Password:

Contact | Free/Busy URL

New | More Info | Delete

OK | Cancel

2. At the Contact Details dialog box, select the **Free/Busy tab.**

3. In the **Contact's name** drop-down list, leave the primary contact name or select an additional contact's name.

4. In the **Free/Busy** URL drop-down list, select file, ftp, or http. In the text box type or browse to the location where the file is published. If you select ftp, type the Username and Password in the text boxes.

   The configured URLs appear in the Contact pane.

5. To add a new contact to the Contact list, click **New** and complete the various drop-down boxes and text boxes as needed.

6. To remove a URL from the pane, select the contact and click **Delete.**

7. Click **OK** to close and save the URL.

   If accessing a contact's free/busy time on an http location, you must configure the Internet Information Services to accept .ifb. See the *GoldMine 8.5 Administrators Guide* for more information.

Configuring Free/Busy URLs

For more information on configuring IIS to access .ifb file types, see the
GoldMine 8.5 Administrator's Guide.

About Scheduling from Meeting Requests

The GoldMine Meeting Request option emails meeting request to GoldMine, Outlook, and other iCalendar-enabled applications.

You can:

• Be the meeting organizer or the recipient of the e-mail meeting request. Schedule an activity from a Meeting Request received in your e-mail from a contact, whether the sender created the activity in GoldMine or another iCalendar-enabled contact management application.

• Retrieve the meeting notice as you would in other Internet e-mail. After retrieving the notice, if you accept, GoldMine records the activity in your Calendar.

• GoldMine decrypts the winmail.dat meeting requests created by Outlook and displays them to users, making it easier to work with Outlook-generated meeting requests.

When retrieving e-mail messages from GoldMine's E-mail Center, the incoming messages look like the following:

```
BEGIN:VCALENDAR
PRODID:-//FrontRange Solutions//GoldMine 5.7//EN
VERSION:2.0
METHOD:REQUEST
BEGIN:VEVENT
ORGANIZER:MAILTO:username@global.not
ATTENDEE;CN="Jerry Gooligan";ROLE=REQ-PARTICIPANT;RSVP=TRUE:MAILTO:user1@gl
obal.not
DTSTART:20020608T170000Z
DTEND:20020608T170000Z
TRANSP:OPAQUE
SEQUENCE:0
UID:3930454A334459292E5B244D4F307B@global.not
DTSTAMP:20020607T144210Z
SUMMARY:Train
```

Creating Meeting Requests

As organizer of an activity, you can send a meeting request for the activity to a user or contact who has iCalendar enabled.

Use the following procedure to create a meeting request.

1. Select **Schedule>><an activity>**. appears.
2. At the **Schedule an activity dialog box**, complete the **Details** tab with the appropriate information.
3. On the **Details tab**, select **Send a Meeting Request to the contact**.
4. On the **Users tab**, select the GoldMine users to include in the activity.
5. On the **Resources tab**, select the resource(s) to schedule with the activity.
6. On the **Recurring** tab, select the date span, frequency, and monthly schedule of a recurring activity.

   Outlook is unable to resolve the **Skip Weekends** option in GoldMine. If you are sending a recurring meeting request to Outlook users, do not select skip weekends in GoldMine.

7. In the **Group Schedule** tab, select the group of contacts to send the meeting request to.
8. After configuring scheduling options, click **Schedule**.

   A meeting request is sent to all participants.

Responding to Meeting Requests

You can respond to a meeting request in your e-mail you can respond several ways.

Use the following procedure to respond to a meeting request.

1. In your GoldMine E-mail Center, double-click to display the message in a window.
2. From the e-mail header, select one option:
   - **Accept.** Accepts the meeting date and time and creates the activity in your calendar. Displays the **Meeting Request Reply dialog box.**
   - **Tentative.** Tentatively accepts the date and time. Displays the **Meeting Request Reply dialog box**.
   - **Decline.** Declines the meeting. **Displays the Meeting Request Reply dialog box.**

When the Meeting Request Reply dialog box appears, select **Send reply**, **Edit reply before sending**, or **Don't send reply**.

- **Propose new time.** Sends a counter-proposal to the meeting organizer. Displays the activity editing dialog box where you change the date and time of the meeting, then send an updated Meeting Request to the contact.

- **View Calendar.** Displays your calendar for the date of the received meeting notice so you can check your schedule before accepting. If you accept, the new activity appears in your Calendar.

GoldMine updates according to the option selected.

Sharing Calendar Information

GoldMine enables several calendaring options including sharing your free/busy times or publishing your entire calendar as well as accessing a contact's shared calendar.

> **NOTE:** Users with limited access to others user calendars may not see other users' forecasts.

Use the following procedure to share GoldMine User calendars

1. To publish your calendar as .ics and .htm, select **Tools>>Options.**
   - Select the **Calendar tab**, then click **More Options** and select the Publishing Tab.
- To automate with Server Agents select **Tools>>Services>>Manage Server Agents**. Select the Calendar Publishing tab and adjust settings.
- To manually publish, select **Web>>Publish Calendar>>Publish Calendar(s)**.
2. To publish your free/busy time as .ifb, select **Tools>>Options**.
   - Select the Calendar tab, then click **More Options** and then select the **Free/Busy Tab**.
   - To manually publish, select **Web>>Publish Calendar>>Publish Free/Busy Times**; Note that .ifb is an iCalendar standard extension.
3. To export your calendar as .ics, **select File>>Import/Export>>Export** to an iCalendar File.

Accessing Shared Calendars

- To read a contact's published .ifb, select **Edit>>Record Properties>>Contact Details>>Free/Busy tab**. See "Setting Free/Busy Times" on page 186.

- To use the Contact's published .ifb in the Schedule an activity dialog box, select **Schedule>>activity>>Free/Busy tab**. See the GoldMine 8.5 Administrator's Guide.

- To importing a contact's .isc and link to a GoldMine contact record (iCalendar), select **File>>Import/Export>>Import from an iCalendar File**. See the *GoldMine 8.5 Administrator's Guide*

Publishing Free/Busy Times

Publish your free/busy times to a network, ftp, or html location. The publishing parameters are set in the calendar preferences:
Tools>>Options>>Calendar(tab)>>More Options>>Free/Busy(tab)

1. Select **Web>>Publish Calendar>>Publish Free/Busy Times**.

2. At the **Free/Busy Publishing Settings dialog box**, review the settings in the text box.

   - To alter the settings, click **Edit Options**. The Calendar Options Free/Busy tab appears. Make changes and click **OK**.

3. Click **OK** on the Free/Busy Publishing Settings dialog box and your schedule publishes to the .ifb file specified on the **Free/Busy** tab.

Contact Communication

About Communicating with Contacts

You can use GoldMine to print and fax correspondence, send email, send pages, and distribute literature. GoldMine integrates the functionality of your word processor and email software to communicate with contacts and coworkers.

- **Email.** Send, retrieve, and manage Internet email. Individuals within an organization can use GoldMine email, providing the same features as Internet email, but not requiring an online connection.

- **Printing and Faxing Correspondence.** GoldMine works with Microsoft Word to merge contact information from GoldMine into templates, generating personalized correspondence. GoldMine's Document Management Center provides a central location to access and manage correspondence.

- **Distributing Literature.** Organizations can manage requests for printed material, such as brochures and price lists, using GoldMine's Literature Fulfillment Center.

- **Paging.** Send a pager message by dialing or sending email.

About the Document Center

The Document Management Center helps you manage document templates. It contains a lists of templates for emails, memos and faxes and other documents you might use in communicating with a contact.
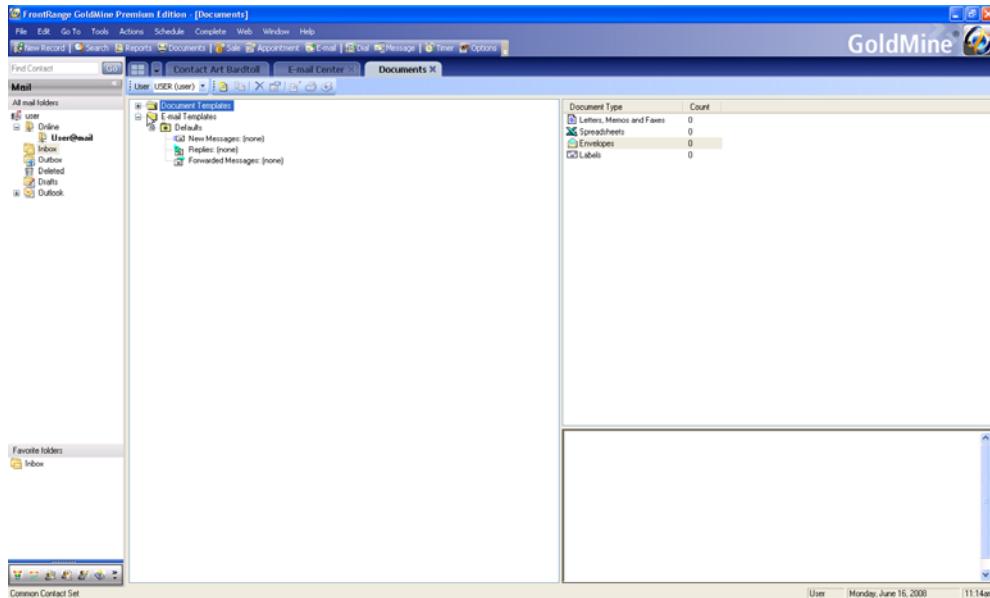
Use the Document Management Center's merge form capability to generate letters, memos, and emails. GoldMine lets you print a letter for one contact or a group of contacts, print labels and envelopes, and fax documents if your word processor supports facsimile transmission).

The Document Management Center works with GoldMine Plus for Microsoft Word.

Use the Document Management Center to:

- Create Document Templates
- Create email Templates
- Clone Document Templates
- Clone E-mail Templates
- Edit Document Templates
- Edit E-mail Templates
- Mail Merge Documents

- Mail Merge E-mail Messages
- Print Documents
- Send E-mail Messages
- Add Subfolders

Also specify, in the GM.ini, the default destination and file name format for templates, merged.

Creating Document Templates

GoldMine installs predefined templates but you can create your own templates as well.

A *template* is a document created in an application, such as Microsoft Word, that links to GoldMine and contains embedded DDE link fields. The DDE fields link contact information to the document; merging to one or more contacts with the template produces a printable document.

There are two ways to create templates:

- With GoldMine Plus installed
- Without GoldMine Plus installed

In both cases you can create new templates. The most common options for creating a document are using WordPad and Microsoft Word with GoldMine Plus for Microsoft Office installed.

> **NOTE:** When manually editing or creating a GoldMine field link in Microsoft Word, you must specify only one formatting system, otherwise the formatting will be ignored in the resulting field set. It is recommended instead that you use IIF (inline if, or a ternary operation statement) to accomplish your formatting goals. Please see Microsoft Word documentation for more information on IIF statements.

To Create a Document Template

1. Select **Go To>>Document Templates.**

2. At the **Document Management Center**, select the **User** from the drop-down list.
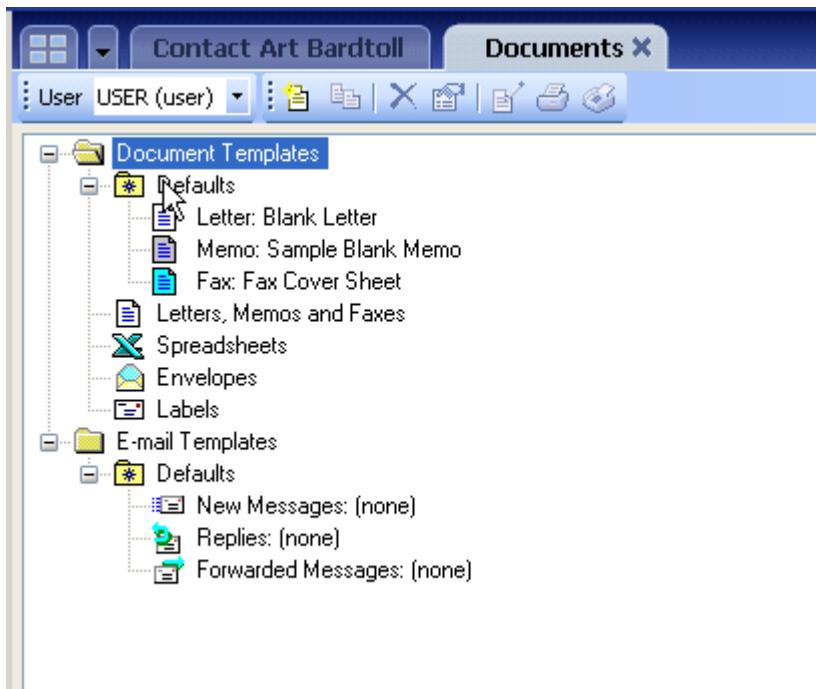
3. Right-click on **Document Templates** and select **New**.

    The Document Template Properties dialog box appears.
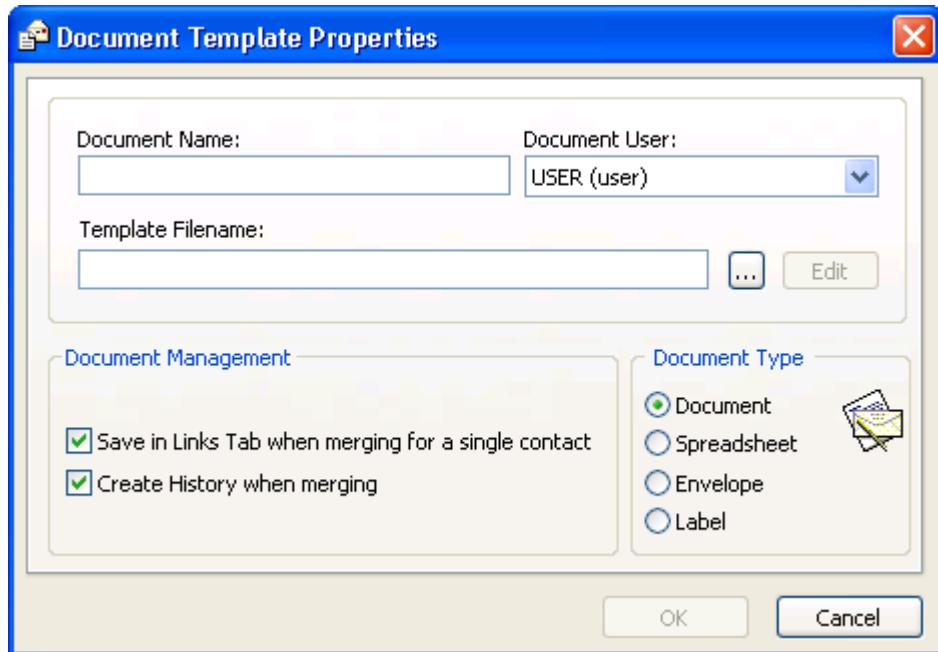
4. At the **Document Name** field, type in the document name you want to appear in the Document Management Center and in the template drop-down list on the Merge Form dialog box.

5. At the **Document User** drop-down box, select the owning user.

6. At the **Template Filename** text box, type or browse to the location of the template.

7. Click **Edit** to open the document and make changes.

8. In the **Document Management** area, click on the appropriate checkbox as needed:

   • **Save in Links Tab when merging for a single contact.** Creates a linked document when the document is merged.

   • **Create History when merging.** Creates a history record when this template is merged.

9. In the **Document Type** area, select a document type and then click **OK**.

   The following Alert Message appears.

ALERT: Suggested Action(s)!

ALERT: Suggested Action(s)!

You have just saved a Document Template.

GoldMine's Document Templates can be used with Filters and Groups to quickly send a target (personalized) mailing to a large list of contacts.

If you already have a Filter/Group defined and ready to do the merge now, please click **OK** to specify and merge this template now. Otherwise, click **Cancel**.

☐ Don't show me this message again   More Info   OK   Cancel

10. If you have defined a Filter/Group defined and are ready to do the merge now, click **OK**.

The Mail Merge Template dialog box opens.
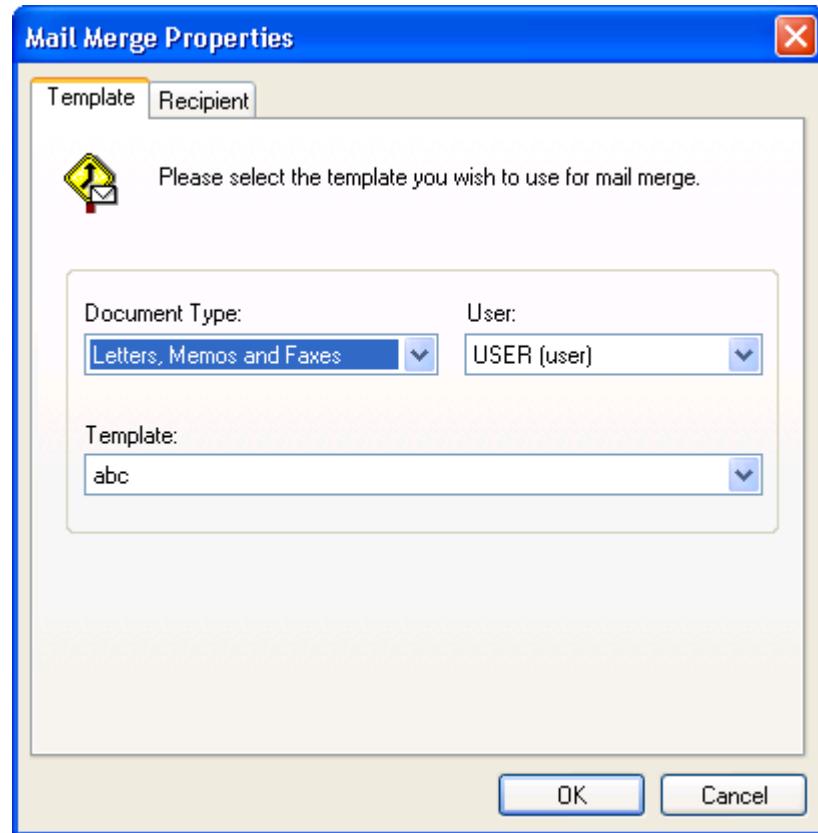
11. At the **Document Type** field, select a document type for a mail merge.

At the **User** field, select and user and, if it does not already appear, at the **Template** field select the template for the mail merge,

12. Click **OK.**

The actual merge occurs after you click **OK**. The settings of this merge will be defined after filling the information on **Recipient** tab, where you can select a current contact (filter/group) and delivery method (printer/fax) or queue for day(s).

So, if the default settings are selected, the template will be printed with the current contact information.

Editing Document Templates

You can edit document templates using the application you used to create the template. In the following procedure, Microsoft Word is used as an example.

1. Select **Go To>>Document Templates.**

2. At the **Document Management Center**, select a user at the **User** dropdown box, select a user.

3. Right-click on a template name and select **Properties.**

   The Document Template Properties dialog box appears.

4. Click **Edit.**

   The document opens in the application used to create it. Use your Word functionality to add, delete, or edit the text.

5. To add GoldMine fields to the document, at the Word document, select **GoldMine>>Insert GoldMine Field.**

6. At the Insert GoldMine Field dialog box, select the field or field macro from the drop-down list.

   Contact is an example of the field macro format.

7. To save the edited template to the same file, select **GoldMine>>Update GoldMine Form.**

8. To save the edited template as a new template, select **GoldMine>>Save as GoldMine Form.**

9. At the **Title** field type in a new title and then click **OK.**

Faxing Correspondence

You can fax correspondence from GoldMine if you install one of these applications:

- **Symantec WinFax PRO 7.01 or later.** Check the version of WinFax PRO by selecting the WinFax main menu command **Help>>About**. To use Symantec WinFax PRO, you must have Microsoft Word version 7.0 or later installed with the WinFax PRO printer driver.

- **RightFax.** a network faxing system. To use RightFax, you must install a printer driver in Windows named RightFax configured to print to the RightFax server.

- **Zetafax 7.5 or later.**

Third-party add-on **OmniRush** provides an integrated fax support solution. For details, visit **www.frontrange.com** or the Z-Firm LLC Web site at **www.zfirmllc.com**.

Use the following procedure to fax a correspondence from the GoldMine Document Center.

1. Select **Go To>>Document Templates.**

2. At the **Document Management Center**, right-click on **Fax, Fax Cover Sheet>>Fax.**

The Mail Merge Properties dialog box opens.

Mail Merge Properties

Template | Recipient

Please select the template you wish to use for mail merge.

Document Type:
Letters, Memos and Faxes

User:
USER (user)

Template:
abc

OK | Cancel
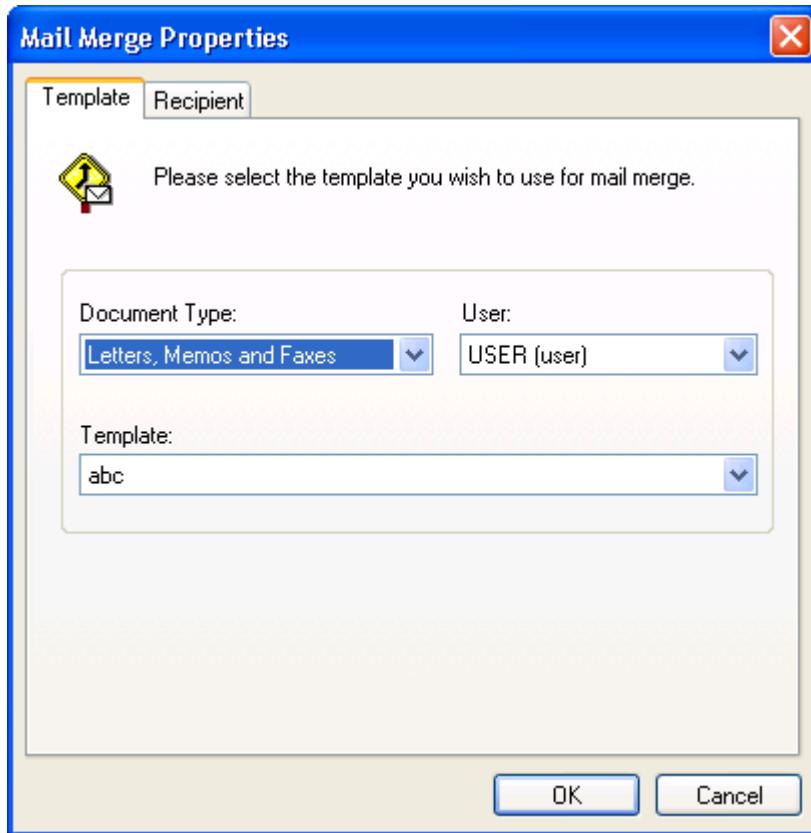
3. At the **Contact Selection** area, select the contact or contacts you want the fax to reach by clicking on the appropriate radio button.

- **This Contact.** Merges the fax with the primary contact from the active contact record or an additional contact selected from the drop-down list.

- **All contacts linked to (contact name).** Merges the fax with the primary and additional contacts for the active contact.

- **All contacts in the following filter or group.** Merges the fax with all contact records or with the filtered group or contact group you select from the drop-down list.

4. If you select **All contacts linked to (contact name)** or **All contacts in the following filter or group,** you can also select these options:

   • **Primary.** Merges the fax with the primary contact.

   • **Additional.** Merges the fax with the additional contacts.

   • **Merge code.** Merges the fax based on the code you select in the F2 Lookup list.

5. At the Delivery area, at the **To** box, select **Fax,** and at the **Queue for x days** box, select a number of days to delay the printing or sending of the document. This option sets the fax to print at a selected number of days in the future.

6. Click **OK.**

   When the merge is complete, the results appear in the **GoldMine Process Monitor** window.
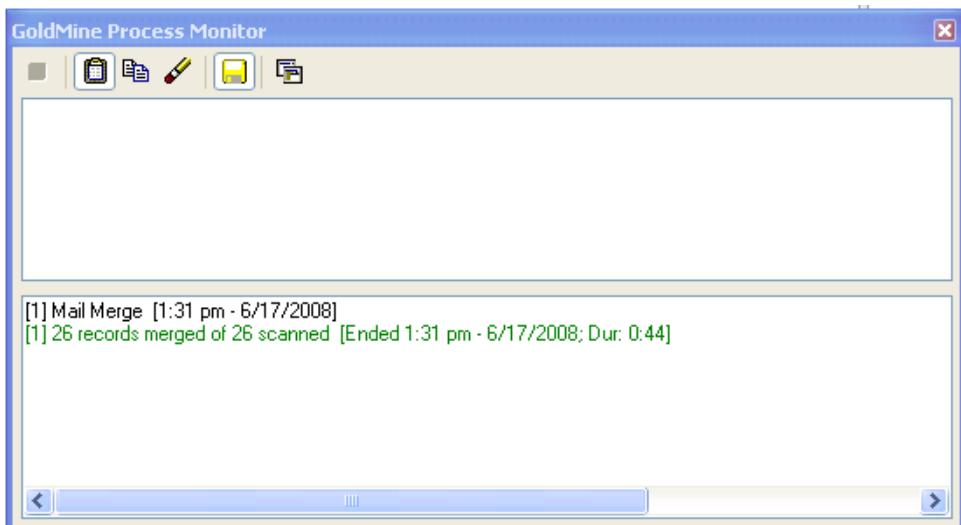
Faxing Your Default Fax Sheet

When you use the Fax capability, GoldMine opens the application used to create the template such as Microsoft Word, then displays the template with information merged from the contact's record. You can also fax a correspondence using a default fax template.

Select **Go To>>Document Templates.** At the **Document Management Center**, open a contact record and then select **Actions>>Write fax to contact.**

Printing Documents

You can print documents for one contact or for a filtered group or group of contacts.

Use the following procedure to fax to print documents from the Goldmine Document Center.

1. Select **Go To>>Document Templates.**

   The **Document Management Center** opens.
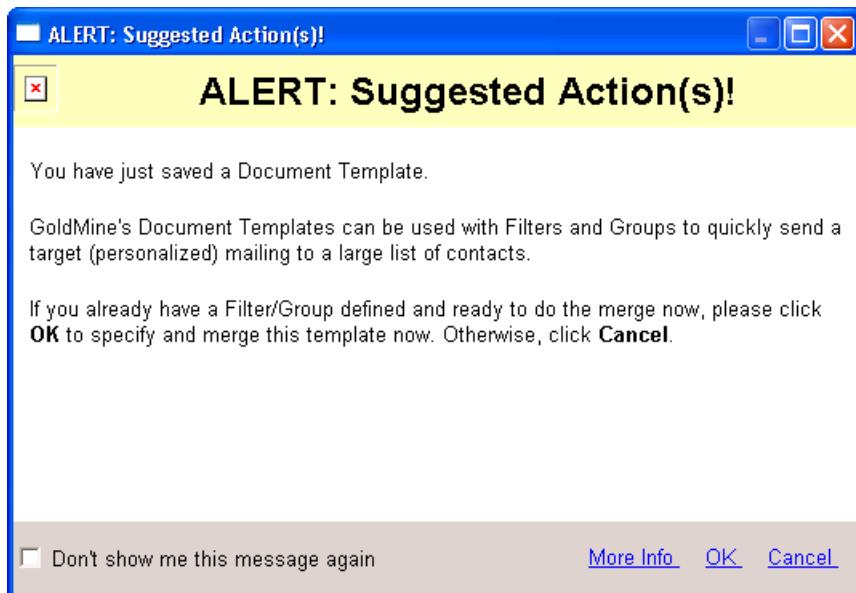
2. Select the **User** from the drop-down list.

3. Highlight the document template you are printing, right-click, and select one of the following options:

   • **Merge & Edit.** Opens the document on the screen with the inserted GoldMine fields populated with information for the current contact record. Edit the document as needed and print using the program's print command.

   > **NOTE:** Due to a Microsoft limitation, the GoldMine menu in Microsoft Word is disabled during the Merge & Edit process.

   • **Print.** Opens the **Mail Merge Properties dialog box.** See "Using Mail Merge Properties (Printing)" on page -205.

   If you print immediately, a record of what was sent to the contact is filed on the **History** tab.

Using Mail Merge Properties (Printing)

Use the following procedure when merging and printing documents.

1. In the Document Management Center, right-click a document template and select **Print** or **Fax.**

    The **Mail Merge Properties** dialog box opens.
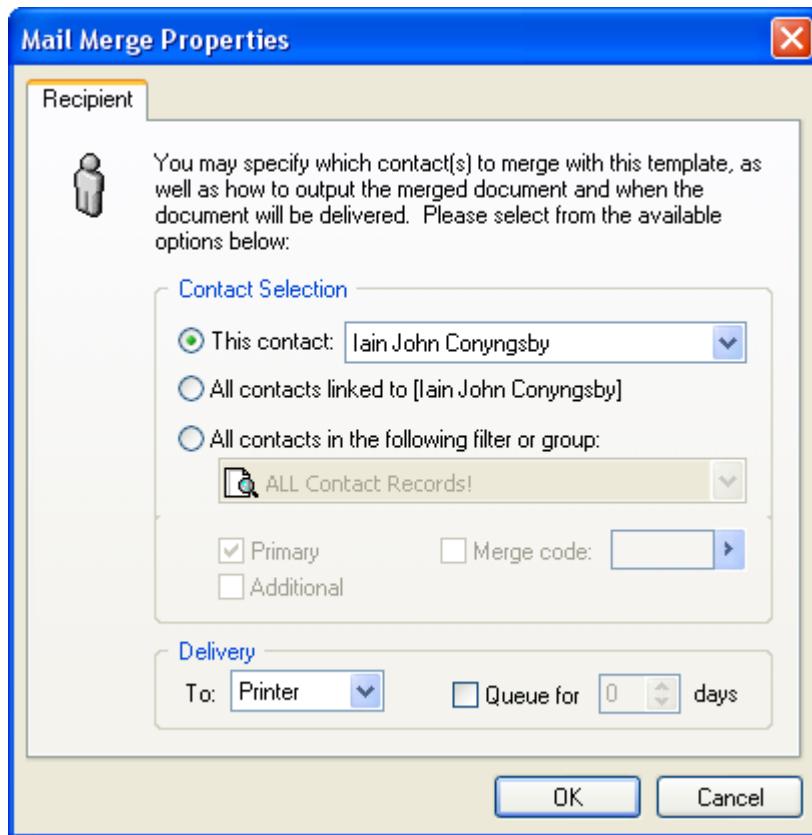
    To access this dialog outside of the Document Management Center select **Actions>>Begin Mail Merge.** The Mail Merge Properties dialog appears with an additional Template Tab.

2. In the **Contact Selection a**rea, select from the following:

   This Contact. Merges the document with the primary contact from the active contact record, or select an additional contact from the drop-down list.

   All contacts linked to (contact name). Merges the document with the primary and additional contacts for the active contact record.

   All contacts in the following filter or group. Merges the document with ALL contact records or with the filtered group or contact group selected from the drop-down list.

3. If you select **All contacts linked to (contact name)** or **All contacts in the following filter or group,** select from the following:

   • **Primary.** Merges the document with the primary contact.

   • **Additional.** Merges the document with the additional contacts.

   • **Merge code.** Merges the document based on the code you select in the F2 Lookup list.

4. In the **Delivery** area, select the **To** method from the drop-down list (Printer or FAX).

5. Type or select the **Queue for x days** to delay the printing or sending of the document.

   This option sets the document to print at a selected number of days in the future using the Server Agents or the Literature Fulfillment Center.

   Printing a mail merge document for a contact produces a History item for that contact.

Printing Envelopes and Labels

You can use the same method as for printing letters, memos, and faxes. Set up GoldMine to print envelopes or labels for documents waiting in a print queue on the same date GoldMine generates the queued documents.

Use the following procedure to print envelopes and labels.

1. To check on queued correspondence in GoldMine's Literature Fulfillment Center, select **GoTo>>Literature.**

2. To print envelopes or labels when queued documents are printed, select **GoTo>>Literature.**

3. Select the folder under **Queued Documents** corresponding to the date the queued correspondence is scheduled to be sent. For example, if the letters are scheduled to be printed later in the current week, select **This Week.**

4. In the upper-right area, right-click each queued document for which to print an envelope or label. From the local menu, select **Print Envelopes** or **Print Labels.** GoldMine displays the **Print Envelopes dialog box** or the **Print Labels dialog box** that contain the same commands.

5. In the **Print Envelopes** dialog box, select the contacts for whom to print envelopes, then select the envelope template to use. By default, GoldMine displays your templates. However, look in the User drop-down list and select a (public) template or another user's template.

Using the E-mail Center

Use GoldMine's E-mail Center to view, organize, and send your queued Internet emails.

Use the E-mail Center to:

• Edit email preferences.	• Link email messages to contacts
• Creating emails	• Create and use email templates
• Send email messages	• Set email rules
• Retrieve email messages	• Create distribution lists

If you subscribe to more than one Post Office Protocol version 3 (POP3) mail server, you can set up the E-mail Center to retrieve mail from multiple Internet mail servers.

E-mail Center Components

The E-mail Center contains the following components:

- **E-mail Center Toolbars.** Allows quick access to E-mail Center functions.

- **E-mail Center tree.** Allows you to connect to your mail server and organize incoming, outgoing, and filed messages.

- **E-mail message listing browse window.** Displays messages available in the in-box, out-box, or selected folder.

The default limit for messages that can be displayed at once is set at 2,500. You or your administrator can implement a <USER>.ini file setting to override this limit, but this is not recommended because of the negative side effects are associated with this action, including:

- Increased load on the database server and the network (the database server will have to read your records from disk, and they will be sent over the network).

- Increased time to load the list of emails in the Email Center list. During this time GoldMine may be unresponsive.

- Increased memory usage by GoldMine. You may have a slower response in the Email Center because it has to process a large number of emails and use more memory.

  For more information on message limits, see the System Settings section of the *GM 8.5 Administrators Guide.*

- **Text display.** Preview the body of a message selected in the listing browse window.

  To turn the preview option on and off, right-click the E-mail Center tree and select **Options>>Show Preview.**

> **NOTE:** Set Show Preview as the default in the [Internet] section of the Username.ini using this command: ShowPreview=1.

General Email Toolbar

The General E-mail Center Toolbar contains buttons and menus for creating, sending, receiving, and filing email messages, setting up email rules, templates, and distribution lists, and editing email options. Buttons in the toolbar appear and disappear depending on the type of activity performed.

The General E-mail Center Toolbar differs depending on which folder is opened in Email Center assuming there are letters in them.

- If an online folder is opened then General E-mail Center Toolbar consists of:
    - New Message, Print, Refresh, Delete, Stop, Reply, Reply to all, Forward and Actions (which is a drop-down button with the following functions: Get selected items, Get all Items, Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)
- If an Inbox (or any sub-), Deleted or Filed subfolder is opened then General E-mail Center Toolbar consists of:
    - New Message, Print, Refresh, Delete, Reply, Reply to all, Forward, File it (with its options), Re-link/Unlink and Actions (which is a drop-down button with the following functions: Mark as Read (Un-read), Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)
- If an Outbox or Drafts folder is opened then General E-mail Center Toolbar consists of:
    - New Message, Print, Refresh, Delete, Re-link/Unlink, Send, Send all, Re-Send, Re-Queue and Actions (which is a drop-down button with the following functions: Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)

- If a Sent subfolder is opened then the General E-mail Center Toolbar consists of:

  - New Message, Print, Refresh, Delete, Forward, File it (with its options) Re-link/Unlink, Re-Send, Re-Queue and Actions (which is a drop-down button with the following functions: Set up E-mail rules, Customize E-mail templates, Set up Distribution lists, Sync Contact, Show Preview, Edit E-mail Options)

Depending on the action being performed, the following commands are available in the General Toolbar:

- **New Message.** Creates a new message in the **Edit E-mail** window, or create a new mail subfolder.
- **Re-link/Unlink.** Links files to or unlink files from contacts.
- **Print.** Prints the currently selected message.
- **Refresh.** Refreshes the contents of the email list.
- **Delete.** Deletes the currently selected message.
- **Stop.** Stops any current retrieval process.
- **Set up Email Rules.** Sets up email rules.
- **Customize E-mail Templates.** Creates and edits email templates, in the Document Management Center.
- **Set up Distribution Lists.** Creates and edit Distribution Lists.
- **Send.** Sends the selected message.
- **Send All.** Send all outbox messages.
- **Re-Send.** Resends the selected message.
- **Re-Queue.** Opens the selected message in the Edit E-mail window and add to the queue in the Outbox.
- **Reply.** Opens a reply to the sender using the Edit E-mail window.
- **Reply to All.** Opens a reply to the sender and all recipients in the Edit E-mail window.
- **Forward.** Forwards the currently selected message to a new recipient.

- **Mark as Read.** Marks currently selected message as *read.*
- **File.** Selects a filing method for the selected message from the drop-down menu
    - **File it.** Opens the Complete and E-mail dialog boxes.
    - **Fast File.** Files the selected message in your Filed folder and in the linked contact's History tab.
    - File to. Saves the selected message directly to a filed folder or subfolder.
- **Actions.** Opens the list of actions such as E-mail, Message and so on.

Edit the Email Toolbar

The Edit E-mail Toolbar is present when the Edit E-mail window is active. It contains buttons and menus useful when creating and editing email messages.

Symbol	Description
	Send the selected message immediately
	Queue the selected message in the Outbox
	Select from the drop-down menu
Save as Draft	Save the selected message to the Drafts folder and close
Save as Draft - Continue Editing	Save the selected message to the Drafts folder and leave open for editing
	Browse for files to attach to the selected message
	Sign with Digital ID
Do Not Encrypt	Send messages without encryption
Encrypt Using GoldMine	Send messages with GoldMine encryption
Encrypt Using Digital ID	Send messages encrypted with Digital ID

Symbol	Description
	Spell check selected message
	Save the selected message as an HTML or text file
	Print the selected message
	Cut selection
	Copy selection
	Paste selection

Local Menus

Use the E-mail Center local menu (also called a shortcut menu) to access commands in the selected browse window, tab, or pane.
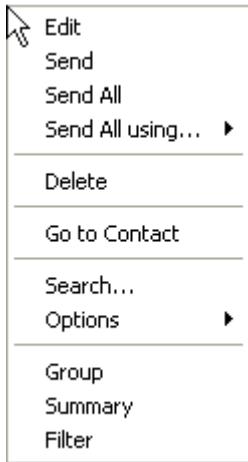
Use the following procedure to access a local menu.

1. Right-click in the window, tab, or pane you are working in

2. Select the action from the menu.

3. Use GoldMine's E-mail Center to view, organize, and send your queued Internet emails.

Use GoldMine's E-mail Center to view, organize, and send your queued Internet emails.

Creating and Sending Email

Use the following procedure to create an email message.

1. Access the Edit E-mail dialog box in one of the following ways:

   - Click the **E-mail button** included on the Global Toolbar.
   - Select **Actions>>Send Email Message or Actions>>Send Outlook Message.**
   - Clicking the **New Message** button on the E-mail Center toolbar.
   - Replying to pending activities.

2. The **From** text box uses the logged in user's name and email account. To change to a different email account for the logged in user, select the account in the drop-down list.

3. The **To** text box populates with the name and email address of the current contact. To change to an alternative name and email address associated with the current contact, select the name from the drop- down list.

4. To send the email to additional recipients, at the **Additional Recipients** box, click on a line and select one of the following:

   - **To: Contact.** Displays the Contact Search Center to locate a new contact.
   - **To: Manual recipient.** Displays the Manual Recipients Entry dialog box. Type a manual email address.
   - **To: GoldMine user or group.** Displays the GoldMine User Recipient dialog box. Select a GoldMine user or user group.
   - **To: Distribution list.** Displays the Distribution List dialog box. Select a predefined distribution list.
   - **To: Outlook (MAPI) recipient:** Launches your local or network Outlook address book.

5. Click **Link** to link the email message to the current contact and file the message in the History tab when sent.

6. To add recipients, click **Cc:.** At the pop up menu, select one of the following:

   - **To:** Adds recipients to the To list.
   - **Cc:** Sends copies to other recipients.
   - **Bcc:** Sends a blind copy to other recipients.

7. Click the **Recipients** button again and select one of the recipient types listed in step 6. Multiple types of recipients are allowed.

8. In the **Subject** text box, type a subject or select a template in the **Subject** drop-down list.

9. Type a message in the message text box. To use HTML formatting in the message, in the **Options** tab, select **Rich text (HTML)**. Check your spelling by right-clicking and selecting **Actions>>Spell check.**

10. To configure settings for: for the
    • Adding email attachments
    • Options tab
    • Mail merge tab

11. Click the **Attachments** icon to add email attachments.

12. Click **Send** to send the message immediately or Queue to queue it for sending at the times defined in the Server Agents Administrator.

Sending Email to Multiple Recipients

Use the **Mail Merge tab** on the Edit E-mail dialog box to send the email to all contacts or to a filtered group of contacts.

Use the following procedure to send an email to multiple recipients

1. At the Edit E-mail dialog box, click the **Mail Merge** tab.

2. Select **Merge this E-mail to a group of contacts** to activate the mail merge options.

3. Select your filter or group in the drop-down list, or click on **<Filters of:>** or **<Groups of:>** to select other users and use their filters or groups.

4. Select **Confirm each recipient** to display a confirmation prompt for each selected recipient.

5. Select merge options:
   • **Primary.** Merges primary contact information with the selected template.
   • **Additional.** Merges additional contacts with the selected template. GoldMine can mass merge both primary and additional contacts into documents. This control is used to include or exclude additional contacts from a mass mailing.

- **Other.** Merges other email addresses linked to the primary contacts.
- **Limit to E-mail merge code.** Merges primary and additional contacts with the specified merge codes. Select the merge codes from the F2 Lookup list. To enter multiple merge codes, separate each entry with a semi-colon (;).

6. Click **Send** to send the message immediately or **Queue** to queue it for sending at the times defined in the Server Agents Administrator.

Creating Email Templates

Use the following procedure to create an email template.

1. Select **Go To>>Document Templates**.

2. At the **Document Management Center,** at the **User** drop-down list on the toolbar, select the user to create the template for. If the template is for all users, select **(public).**

3. Right-click on E-mail Templates and select **New.**

    The **Edit E-mail** window opens.
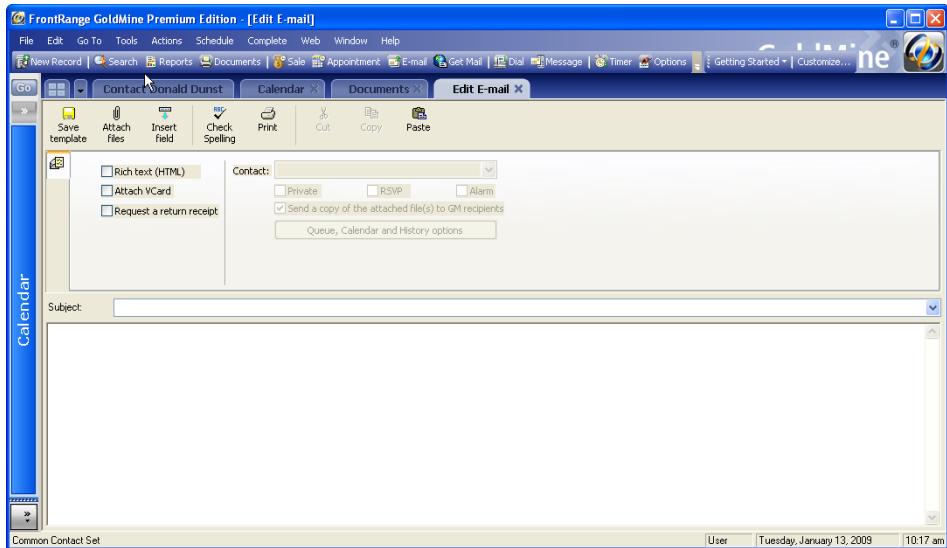
4. At the **Subject** field, type the subject of the email.

> **NOTE:** The subject you type becomes the subject line when using the template; consider what you are sending to contacts. The subject is also the template name appearing in the Document Management Center, so it must be unique.

5. Click **Attach files** button on the Edit E-mail toolbar to attach a file to the template.

6. Browse to locate the file you are attaching to the template.

7. Select the **Options** tab to configure template formatting and encoding options.

8. Select Rich text (HTML) to send the message in HTML. The Rich text format options lets you use specialized fonts and insert .bmp files.

9. If your recipient's system does not support HTML, leave the check box blank to send the message as plain ASCII text.

10. **Wrap lines** is the default. When a word is typed at the end of a line, the next word is placed at the beginning of the following line.

    When creating a template, you cannot change this option.

11. Select **Attach VCard** to include a .vcf file with your message. The VCard contains basic contact information.

12. Select **Request a return receipt** to receive an email acknowledgement from the recipient upon receipt. This option returns results only if the recipient's email system supports the return receipt feature.

13. Click in the lower pane and begin creating the body of the message. Use these editing options to create the message:
    *   HTML Toolbar
    *   Local Menu

14. If desired, insert GoldMine fields into the message body, creating a dynamic email message using data from the contact record in the merged document. Right-click in the message box and select **Actions>>Insert GoldMine Field.**

User name	
User full name	
Contact details ▶	Company
	Contact
Creation date	First name
Creation time	Last name
	Last, first name
Quote text for reply/fwd	Dear
Signature file	Title
Cursor position	
Include a text file	Address ▶
Conditionally include a text file	
	E-mail address
Recipient Name	Web site
Recipient E-mail	
	Phone number
	Fax number
	Notes
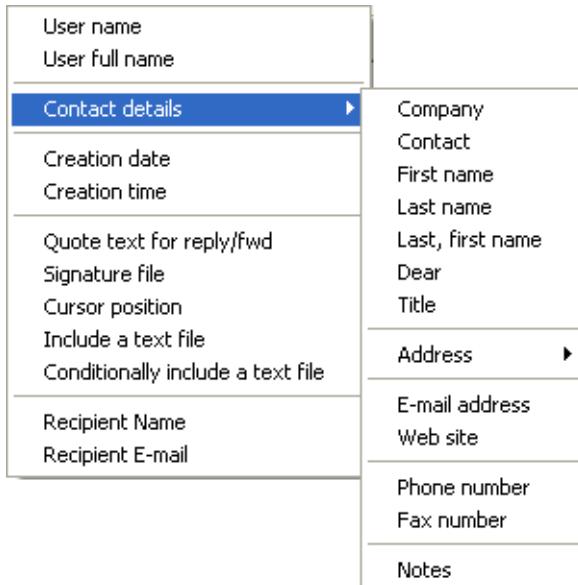
15. I.To save the template, right-click and select **Actions>>Save template.**

> **TIP:** Insert Key1-Key5 fields by placing the cursor at the location to insert the field and type. For example, <<key1>>, to insert the data from the Key1 field in the merged email. Insert user-defined fields by placing the cursor and typing <<Contact2->Ufieldname>>

Sending Emails from the Document Management Center

Use the following procedure to send emails from the Document Management Center.

1. Select **Go To>>Document Templates** or click the **Documents** button on the toolbar.

The **Document Management Center** opens.

2. At the **User** field, select a user from the drop-down list.

3. Highlight and right-click on the email template you want to send and then click **Merge.**

The Mail Merge Properties dialog box opens.
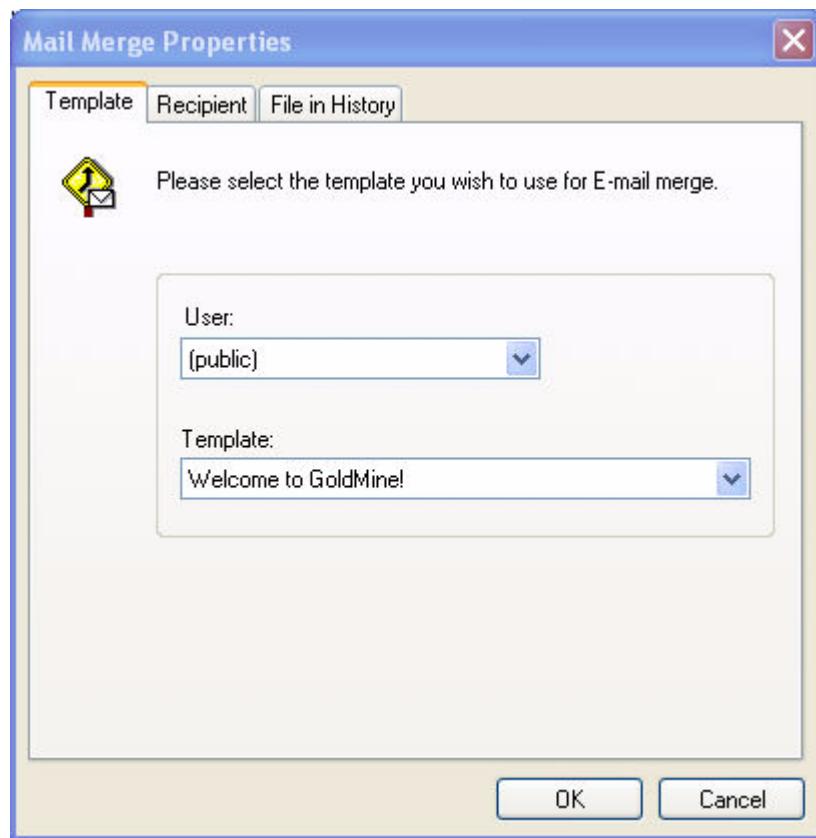
4. Select the user and template in the appropriate fields, if not already selected and then click **OK**.

The email is ready to be sent.

If you send the email immediately, a record of what was sent to the contact is filed on the **History** tab.

Replying to an Activity

Use the following procedure to determine how activity information is recorded when replying to a user's email.

1. At the **Pending** tab, right-click on a listed activity and select **Reply.**

   The **Reply to an activity** dialog box opens.
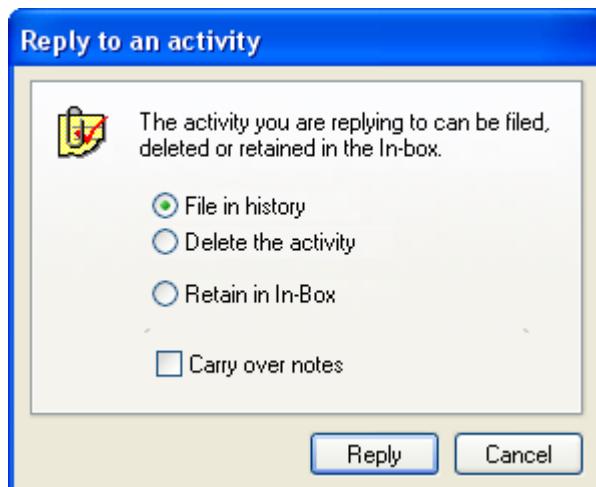
2. Select one of the following radio buttons:

   • **File in history.** This button deletes the activity and creates a record of the outgoing email message on the current tab. It creates a history record of the activity and adds a record of the outgoing email message on the **History** tab.

   • **Delete the activity.** This button deletes the activity from the current tab and creates a record of the outgoing email message on the current tab and the **History** tab.

   • **Retain in the In-Box.** This button leaves the activity on the current tab and creates a record of the outgoing email message on the **History** tab.

   Select **Carry over notes** to keep notes with the activity record.

3. Click **Reply.**

   The **Edit E-mail** window opens with the message addressed to the GoldMine user who created the activity.

4. Edit the message as needed and then click **Send.**

Spell-Checking Email

Use the E-mail Center to check the spelling in the message, improve professional presentation, and customize the spell-checker.

Open the **User Options>>Spell tab** dialog box for basic customization; for more information. see "Setting Options for the Speller Tab" on page 72.

You can customize the speller as you work, adding words and creating individual or company dictionaries. For more information, see "Creating Dictionaries" on page 221.

Use the following procedure to spell check an email.

1. After creating your email, click **Check Spelling** button on the E-mail Center toolbar.

The Check Spelling dialog box opens.

The questionable word appears in the **Not in Dictionary** field.

Suggestions are listed in the **Suggestions** list. The words displayed are based on the options selected on the Speller tab.

2. Select an option:

- **Ignore.** Skips this occurrence of the questionable word; if the word comes up again, it will be tagged and displayed.

- **Ignore All.** Skips this and all subsequent occurrences of the word in this document.

- **Add.** The word is added to the dictionary displayed in the Add words to text box.

- **Change.** Replaces the questionable word with the one highlighted in the Suggestions list; or, if the word is edited, the edited word is used as the replacement.

- **Change All.** Changes this and all subsequent occurrences of the word in the document. The selected word in the Suggestions list is used unless the word is edited, in which case the edited word is used.

- **Suggest.** Searches more thoroughly for a suggested replacement word for the questionable word. Each time you press the Suggest button, a deeper search is made. When the spell checker exhausts all possibilities, the Suggest button is disabled.

3. To edit a questionable word, type a revised version of the word in the **Not in Dictionary** text box. **Ignore** changes to **Undo edit.**

Clicking **Undo edit** returns the edited word to the original form.

4. Use the **Check Spelling** dialog box to change the Options and Dictionaries.

5. Select **Undo** if you made changes to a document with **Ignore** or **Change** and wish to undo the changes.

The **Undo** button takes you back one word at a time.

6. Click **Cancel** to stop the spell checker and close the window.

Creating Dictionaries

Use the GoldMine spell checker to configure and customize the dictionary for each user. Add words, import files, and change the action on individual words.

Use the following procedure to create dictionaries.

1. Select **Tools>>Options**, and select the **Speller** tab.

2. Click **Setup Dictionaries.**
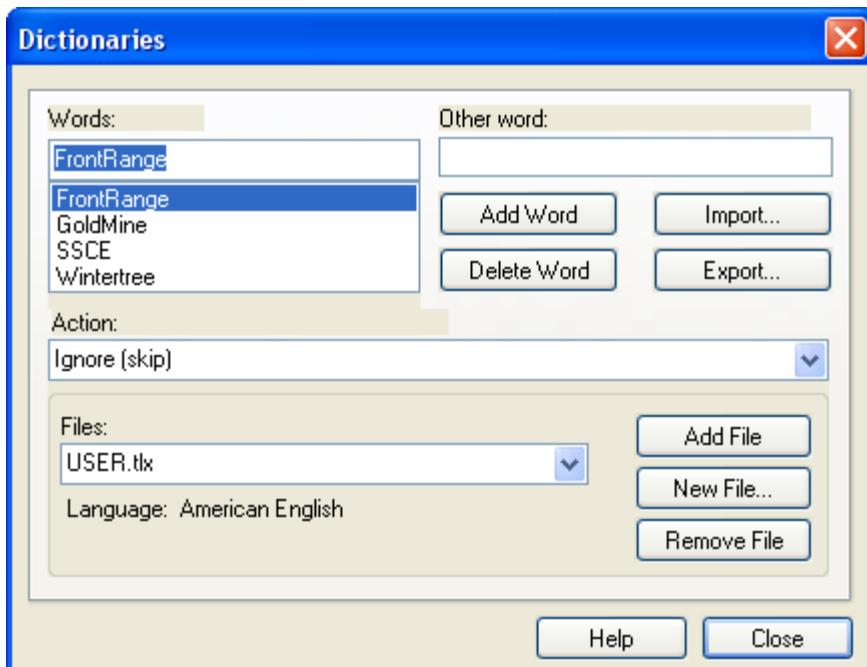
3. At the Dictionaries dialog box, select from the following options as needed.

The **Words** text box lets you add a word or edit the highlighted word from the text box. The text box listing displays the words in the Files.tlx file.

- To add a word, type the word and then click **Add Word.**
- To edit a word, highlight the word, type the correction and click **Add Word**.
- To type case variations on a word, at the **Other word** text box type in the word and then click **Add Word.**

4. Click **Delete Word** to remove the word from the dictionary file.

5. Click **Import** to import the words in a .txt file to the current Files .tlx file.

> **NOTE:** When files with multiple word phrases are imported, each word adds individually rather than as a phrase.

6. Click **Export** to export the words in the current Files .tlx file to a .txt file.

7. At the **Action** drop-down list, select an action to apply to individual words:
   - Auto change (use case of checked word)
   - Conditionally change (use case of other word)
   - Conditionally change (use case of checked word)
   - Ignore (skip)
   - Exclude (treat as misspelled)

8. To apply an action to a word:
   - Highlight the word in the **Words** field listing.
   - Select the action from the **Action** drop-down list.
   - Click **Add Word.** The action you selected applies to that word.

9. The **Files** drop-down list displays available custom .tlx dictionaries.

   Click **Add File** to browse to other .tlx files.

> **NOTE:** The .tlx files store in user folders in the Speller folder of the main GoldMine directory.

10. To create a new dictionary, click **New File.**

A .tlx file is created, and the New Dictionary dialog box opens.

Type the new **File Name**. Select the **Language** from the drop-down list and click **OK.**

11. Click **Remove File** to delete the current .tlx file.

12. Click **Close** to save the settings.

Retrieving Internet Email

To retrieve Internet email within GoldMine using a dial-up Internet Service Provider (ISP), you must use a ISP with true Internet mail access. Internet access provided by most commercial online services, such as CompuServe or Microsoft Network, will not work with the GoldMine Internet email feature. You must configure Windows for dial-up networking to connect to your ISP.

> **NOTE:** For assistance with setting up Windows to communicate with your Internet service provider, contact your service provider.

You can retrieve email two ways.

Retrieve Email Manually

The default configuration in Windows requires manual dialing.

1. From the Microsoft Windows status bar, click **Start.**

2. Select **Programs>>Accessories>>Dial-up Networking.**

3. In the **Dial-Up Networking** window, double-click the icon for your service provider.

4. In the **Connect To** window, ensure all settings are correct, then select Connect.

5. After your computer connects successfully, start or switch to GoldMine, then retrieve Internet email.

Retrieve Email Automatically

Your Internet Preferences must be configured properly in the User's Options. Using the Microsoft Internet Explorer, you can configure Windows to automatically dial your ISP when you retrieve Internet email. The default configuration in Windows requires manual dialing.

1. From the Microsoft Windows status bar, click **Start** and then select **Programs>>Accessories>>Dial-up Networking.**

2. In the **Dial-Up Networking** window, double-click the icon for your service provider.

3. In the **Connect To** window, ensure all settings are correct, then select **Connect**.

4. After your computer connects successfully, start or switch to GoldMine, then retrieve Internet email.

Retrieving Email

Use the following procedure to retrieve Internet email.

1. Select **Go To>>E-mail** to jump directly to the POP Password dialog box for retrieving from your primary account.

2. If you are in the E-mail Center, click the email account to retrieve.

3. The POP Password dialog box appears if you do not have your Internet email password configured in the Internet tab of your User's Options.

4. Type the Password and click **OK**.

   GoldMine downloads the waiting email from your POP3 server email account.

5. Read and process your email while connected online or move it to your GoldMine Inbox and disconnect from your email server. To read email in the E-mail Center, double-click the message.

> **NOTE:** When you move messages from Online to Inbox, the Attach E-mail to Contact dialog box appears. Select how to link messages to contacts.

6. To process the message, right click the message in the **E-mail re:** text box and select **Actions**.

   You can also read retrieved email by selecting **Read from the local menu** in the Activity List or on the Pending tab of the contact record.

7. Configure email settings by selecting Tools**>>Options**.

   The User's Options dialog box opens. Select the **E-mail tab.**

8. After the email options have been set, retrieve internet or Outlook email messages manually or automatically in the E-mail Center.

9. Select **Go To>>Mail.** The E-mail Center opens.

   In the view window of the Navigation Pane, click an account in your Online folder to check internet email, or open the Outlook folder to manage Outlook messages.

10. To process the message, right click on **Action.**

    You can select any option depending on how you want to process the message (for example, Reply, Forward, and so on.)

    You can also read retrieved email by navigating to the local menu in the Activity List or Pending tab of the contact record and the selecting **Read.**

11. Configure email settings by selecting **Tools>>Options**.

    The **User's Options** dialog opens. Select the **E-mail** tab.

12. After email options have been set, retrieve internet or Outlook email messages manually or automatically in the E-mail Center.

    • Select **Go To>>Mail**.

13. In the view window of the Navigation Pane, click an account in your Online folder to check internet email, or open the Outlook folder to manage Outlook messages.

Linking Email Messages to Contacts

You can attach email messages to contacts using the Attach E-mail to Contact dialog box.

Use the following procedure to link an email to a contact.

1. Select **GoTo>>Mail.**

2. In the E-mail Center, move messages to the Inbox or right-click and select **File.**

   The Attach E-Mail to Contact dialog box appears displaying the sender's Internet account name, return address, subject of the message, and the VCard name if there is one.

   If the message was sent with a VCard, select **Use the VCard** information if you create a new contact based on the VCard information.

3. For an unlinked message select one:

   • **Find an existing contact and link this message to it**. Use the Contact Search Center to select a contact. GoldMine will associate the message and VCard file with the selected contact.

   • **Create a new contact and link this message to it.** Uses the VCard information to create a contact and displays the **Read E-mail** dialog box. GoldMine will associate the message and VCard file with the selected contact.

   • **Find an existing contact, create a new additional contact, and link this message to it.** Use the Contact Search Center to select a contact. GoldMine will create an additional contact from the sender of the message, then link the message to the contact record.

   • **Do not link this message to any contact.** Displays the Read E-mail dialog box without associating the message or VCard information to a new or existing contact. If you have selected one of the first three options, you may select Link the address **<E-mail Address>** to the contact to link the **From:** email address of the retrieved mail to the contact. Click OK. If linking multiple messages, the dialog box appears for the next message.

Reading Email

The E-mail Reader window is the primary way you work with individual email messages.

Use the following procedure to read an email

1. Launch the **E-mail Reader** by double-clicking a message in the E-mail Center or the contact.

2. On the **Retrieval** tab of the Internet Preferences dialog box, select **Open Read E-mail**.

   GoldMine opens your email upon retrieval.

3. The E-mail Reader window displays the full message with selected header information. Use the toolbar or right-click the message body and select an option from the local menu.

> **NOTE:** GoldMine decodes and displays email messages and attachments created in the MS RTF (Rich Text Format) sent as winmail.dat files rather than displaying them as attachments. This creates smooth inter-operability between Outlook messages created in Outlook and GoldMine.

Using E-mail Templates

After creating an email template in the Document Management Center, select it when creating an email.

1. Select **Actions>>E-mail**, or **Schedule>>GoldMine E-mail.**

2. From the E-Mail Center, click **New Message** in the toolbar.

   The Edit E-mail dialog box opens.

3. At the **Subject** drop-down list. select the template.

4. To select the template of another user, click **Select Template User**.

5. Edit the message as needed.

6. Click **Send** to send the message immediately or **Queue** to queue it for sending at the times defined in the Server Agents Administrator. For more information about the Server Agents, see the *GoldMine 8.5 Administrators Guide.*

Configuring the E-mail Center

Use GoldMine for your email by acquiring an email account and setting up your system to access the Internet e-mail account. Your administrator can configure settings to:

- Format outgoing messages.
- Handle incoming messages.
- Add Internet e-mail accounts.
- Customize the GoldMines E-mail Center.
- Define advanced settings to apply globally to the E-mail Center, existing attachment files, message operations, and data imported from a World Wide Web (www) site.

For information and procedures to configure the E-mail Center, see the *GoldMine 8.5 Administrators Guide.*

Creating Email Rules

Create rules set to specify conditions and actions for handling email. For example, use email rules to filter incoming messages, minimizing the amount of unwanted email.

Your administrator can set up email rules for you. For more information, see the *GoldMine 8.5 Administrators Guide.*

Creating Distribution Lists

Use the following procedure to create custom email Distribution Lists of contacts, users, and manual email addresses.

1. In the E-mail Center, right-click and select **Options>>Set up Distribution Lists.**
2. At the Distribution List Center, right-click the upper-right pane and select **New Distribution List.**
3. Type a descriptive name for the list and press **Enter.**

4. Right-click the new distribution list and select one of the following options:

- **Add Contact.** Add a contact from the Contact Search Center.
- **Add Contacts E-mail.** Add a contact from the Contact Search Center and specify the email address.
- **Add User.** Add a user or user group.
- Add Manual E-mail address. Select or type the email address.

NOTE: You can add more than one recipient to the Distribution list.

Using the Document Management QuickStart Wizard to Access a Web Page

GoldMine Plus for Microsoft Office is installed during the main GoldMine application installation. It can also be installed independently by using the Add/Remove Programs Windows control panel.

GoldMine Plus for Adobe Acrobat is installed from its own installer. For more information about installing and using GoldMine Plus for Adobe Acrobat, please see the document: *GMAcrobatLink.pdf*, located on your GoldMine installer CD, or via: http://support.frontrange.com

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NOTE: GoldMine must be installed locally in order to install the Acrobat Link. It will not function from a shared folder location.

This Document Management QuickStart Wizard directs you to an informational web page. It does not install any add-on products.

1. Select **Tools>>Quick Start Wizard.**

The GoldMine QuickStart Wizard dialog box opens.

2. Click the **Document Management Wizard** button .

A web page opens in your browser showing details about the GoldMine Plus suite of products.

Using Encryption and Digital IDs

Using Digital IDs with Email Messages

If you and your contacts use digital IDs to verify signatures and send encrypted email messages, you can use GoldMine to configure your Internet E-mail Options.

Your digital ID, also known as a digital certificate, is a file sent with an email message identifying you as the authentic sender. Digital ID certificates are files issued by a certified security authority such as VeriSign, Inc., or from your Microsoft Exchange Server administrator. Digital IDs have an expiration date and must be renewed periodically to remain valid. A digital ID typically contains:

- Your name and email address as a digital signature
- Your public key
- Expiration date of the public key
- Name of the Certification Authority (CA) who issued your Digital ID
- Serial number of the Digital ID
- Digital signature of the CA

Using Digital IDs

A digital signature provides security by verifying the message originated from a specific person and that the message has not been altered. A digital ID also works as a message encryption method. Digital ID encryption scrambles a message with a recipient-specific algorithm.

Public and Private Keys

The digital ID encryption uses a system of key pairs that include a public key used to encrypt a message and a private key used to decrypt a message. The sender of a secure email must have the recipient's public key to encrypt the message. When the message is received, it is decrypted using the recipient's matching private key.

Using GoldMine you can exchange encrypted email messages with a contact. You must have the contact's digital ID that includes his or her public key and the contact must have your digital ID that includes your public key.

In GoldMine, you must then import the contact's Digital ID using the contact's **Edit>>Record Properties>>Contact Details>>Digital IDs** tab and import your Digital ID using your **Internet E-mail Preferences>>Security** tab.

For example, when you send an encrypted message to a contact, it is encrypted in GoldMine using the public key the contact provided you. When he or she receives the message, it is decrypted by the contact's email application using his or her private key. Conversely, when a contact sends you an encrypted message it is encrypted by the sender's email application with your public key (provided earlier). When you receive the message, it is decrypted using your private key.

Levels of Security

- **Signed.** The message is signed with the sender's private key. Sending a message with a digital signature confirms the message was sent by the sender listed in the From address.
- **Encrypted.** The message is sent with the recipient's public key. The recipient provides you with his or her public key before you send the message. When a message is encrypted, the body and attachments are hidden from anyone who does not have the recipient's private key. Only the recipient should have the recipient's private key. An encrypted message does not guarantee to the recipient that the sender is the name in the From address.
- **Signed and Encrypted.** The message is signed with the sender's private key, confirming for the recipient the message was sent by the sender in the From address, and it is encrypted with the recipient's public key and then decrypted with the recipient's private key when he or she receives the message.

Sharing Public Keys

For security reasons do not share your private key. You can share your public key with contacts two ways:

- **Digital ID Signature.** Your Digital ID is attached to any message that includes a Digital ID Signature. The recipient can then extract it and import it into his or her email application. For example, in Outlook the user can right-click the sender's name on a message and add the contact to his or her existing contacts. The digital ID certificate is included.
- **Export.** Export your Digital ID send it to a contact who can then import the file into his or her email application. For example, in Outlook the file is imported on the contact's Certificate tab.

Using Digital IDs in GoldMine

- **Configuring Contacts' Digital IDs.** Imports a contact's digital ID into the contact record.
- **Configuring GoldMine Users' Digital IDs.** Imports your digital ID into GoldMine. You determine the signature and encryption settings.
- **Sending Digitally Signed E-mail Message.** Sends a message with your Digital ID signature.
- **Sending Encrypted E-mail Messages.** Sends individual messages with a digital ID signature or GoldMine encryption.
- **Reading E-mail Messages Sent with Digital IDs**. Reading digitally signed, encrypted, or signed and encrypted email messages.

Sending Encrypted Email

Protect email messages with encryption. Messages encrypted with **Encrypt using GoldMine** can only be read by GoldMine users with the correct password. Messages sent as **Encrypt using Digital ID** can only be sent using the recipient's public key and can only be decrypted and read using the recipient's private key.

- **Sending Encrypted Messages Using GoldMine.** See "Sending Email Messages Encrypted Using GoldMine" on page 233**.**
- **Sending Encrypted Messages Using Digital ID.** See "Sending Email Messages Encrypted Using Digital ID" on page 234.

To automatically encrypt outgoing messages with digital IDs, configure your settings on the Security tab in your Internet Preferences. Use the **Encrypt Message** toolbar button drop-down menu to select **Do not Encrypt** and send a message without encryption.

Sending Email Messages Encrypted Using GoldMine

You can protect email messages with encryption. Messages encrypted with Encrypt using GoldMine can be read only by other GoldMine users with the correct password.

Use the following procedure to send an encrypted email.

1. On the toolbar, click the **Encrypt Message** button (if you are reading a message and want to encrypt it before sending it to other GoldMine users or filing the message, automatically encrypt using GoldMine; otherwise, select **Encrypt using GoldMine**.

   The Encryption Settings dialog box opens.

2. Select **Encrypt the message**.
3. In the **Password** field, type the password you are using on the message.
4. In the **Encryption mode** drop-down list, select the encryption level.
5. Click **OK** to save your settings.

> **NOTE:** Only users with the proper password and working in GoldMine can open the message.

Sending Email Messages Encrypted Using Digital ID

When you encrypt a message using a digital ID, you must have the contact/recipient's digital ID configured in the Record Properties>>Contact Details. Encrypting a message to a recipient with a digital ID encrypts the message using the recipient's public key. When recipients receive the message, they decrypts it using his or her private key. You can configure your Internet Security settings to automatically encrypt all outgoing messages with a Digital ID.

Use the following procedure to send an encrypted email using digital ID.

1. On the tool bar, click the Encrypt Message drop-down arrow ⬛▾ button and select **Encrypt using Digital ID.**

   The outgoing message will be sent encrypted.

2. If a Digital ID is not configured for the contact, a warning box states GoldMine cannot encrypt the message. Click **OK** to return to the unsent message window.

3. Configure the contact's Digital ID or remove the encryption from the message by clicking the **Encrypt Message** drop-down arrow and toggling the **Encrypt using Digital ID option** off.

For more information on encrypted email messages, see the *GoldMine 8.5 Administrator's Guide*.

Sending Digitally Signed Email

When digitally signing a message, you must have a digital ID configured in GoldMine. The digital signature contains your private key and confirms for the recipient your From address matches the signature. Configure your Internet Security settings to automatically sign all outgoing messages with your digital ID. For more information, see the *GoldMine 8.5 Administrator's Guide*.

On the toolbar, click the **Sign with Digital ID** ⬛▾ button. Your digital signature is added to the outgoing message.

Reading Email Sent with Digital IDs

Receive email messages digitally signed and encrypted from non-GoldMine users.

Senders must have a Digital ID from a valid Certificate Authority before they can send you a signed email.

To send you an encrypted email message, senders must have your Digital ID public key from a valid Certificate Authority. When receiving the message, GoldMine asks you for your password in the **Private Key Password dialog box.**

Signed Icon in Inbox	**Signed with a Digital ID.** When receiving a digitally signed message, the message includes the sender's digital signature and public key. When the message signature is verified, the Inbox displays a signature icon next to the message. When you open the message, you are notified if the signature is verified or if the signature verification failed.
Encrypted Icon in Inbox	**Encrypted.** When receiving a digitally encrypted message, the message was encrypted with your public key (supplied to the sender at an earlier time). The message is decrypted using your private key You are asked to supply the password to your private key to read the message.
Signed and Encrypted Icon in Inbox	Signature Verified Banner on Message **Digital Signature Verified!**
Failed Encrypted and Signed Icon in Inbox	Signature Verification Failed Banner on Message **Digital Signature Verification Failure!**

Reasons signatures can fail.

- The sender and signature do not match.
- The digital signature is expired.
- The Certificate Authority is not configured in GoldMine.

About the Literature Fulfillment Center

Use the Literature Fulfillment Center to manage and track brochures, price lists, and other publications sent to your contacts.

The Literature Fulfillment Center stores and processes literature requests in one easy-to-view and manage location. New publications can be added to a list for other users to select for their contacts.
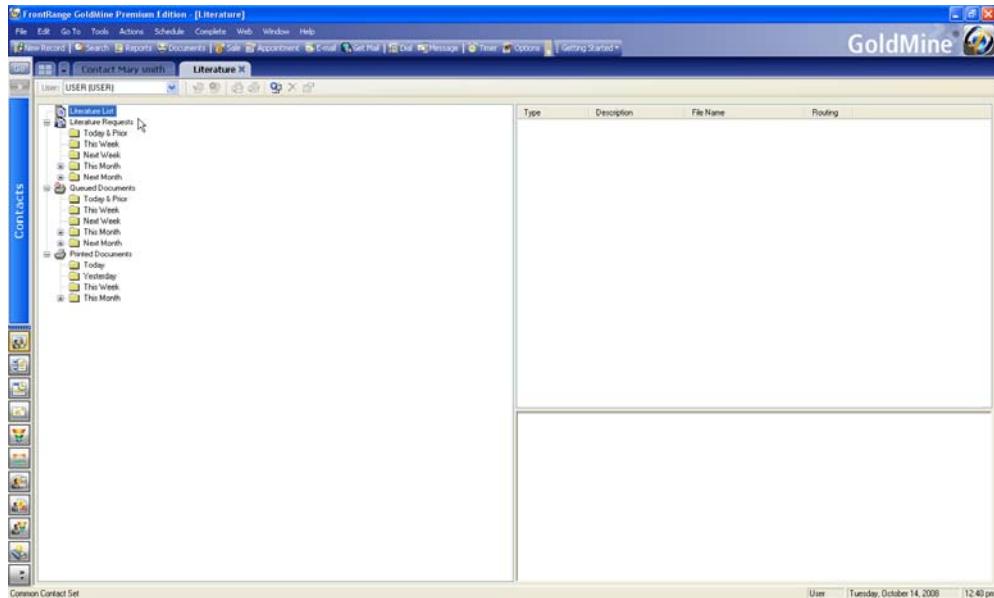
You can perform the following tasks in the Literature Fulfillment Center:

• Add documents

• Edit document properties

• Fulfill or reject scheduled requests

• Edit scheduled requests

• Fulfill or reject queued documents

• Edit scheduled documents

General management displays in the left pane and specific requests in the upper right pane. The lower right pane displays associated attachments or a preview window of the document that was printed.

Use the following procedure to access the Literature Fulfillment Center

1. Select **Go To>>Literature.**

   The **Literature Fulfillment Center** opens.

2. Use the toolbar to execute commands or local menu options in the left pane to manage:

   - **Literature List.** A predefined literature list that varies depending on which user created the literature packet. This list is available when you schedule a Literature Request. When selecting a Literature List in the left-hand pane, the literature options display in the right pane.

     Right-click on the Literature List to access the local menu.

     - **Refresh.** Refresh the Literature List.
     - **Refresh All**. Refresh everything in the left pane.

   - **Literature Requests.** Literature requests by date. When you select a date, the literature requests scheduled for that date or date range are displayed in the upper right pane. The literature requests are added by scheduling a Literature Request.

     Right-click on **Literature Requests** to access the local menu.

     - **Refresh.** Refresh the Literature List.
     - **Refresh All.** Refresh everything in the left pane.
     - **Expand.** Expand the date options.

   - **Queued Documents.** Queued requests by date. When selecting a date, the literature requests scheduled for that date or date range display in the upper right pane.

     Queued documents are added to the Literature Fulfillment Center when configuring Mail Merge properties through the Document Management Center. Queued documents can be manually fulfilled through the Literature Fulfillment Center or automatically executed at the selected time if you configured the Server Agents to Print/FAX.

     Right-click Queued Documents to access the local menu. For more information on server agents, see the *GoldMine 8.5 Administrators Guide*.

     Queued Documents Local Menu

     - **Refresh.** Refresh the Literature List.
     - **Refresh All.** Refresh everything in the left pane.

- **Printed Documents.** Documents and literature requests you fulfilled. Right-click **Printed Documents** to access the local menu.

  - **Refresh**. Refresh the Literature List.

  - **Refresh All.** Refresh everything in the left pane.

  - **Expand.** Expand the date options.

  - **Purge All**. Delete all information from the Printed Documents list.

Adding Documents to the Literature Fulfillment Center

Use the following procedure to add an existing publication or file to the Literature List.

1. Select **Go To>>Literature**.

2. At the **Literature Fulfillment Center,** highlight **Literature List** in the left pane and right-click and select **New** from the local menu.

    The Literature dialog box opens.
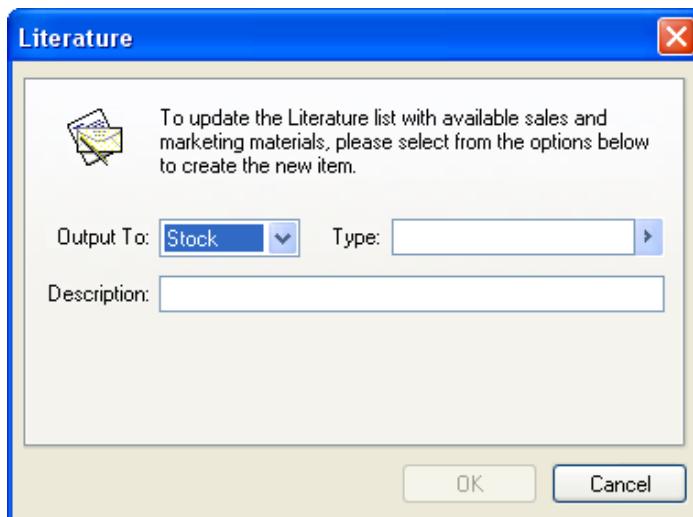
3. In the **Output To** drop-down list you can select one of the following:

    - **Stock.** Literature that is printed and available as shelved stock.

    - **Printer.** Literature that is to be printed from a file.

    - **FAX.** Literature that is to be sent via fax.

4. In the **Type** field, type or select the literature type from the F2 Lookup list.

5. In the **Description** field, type or select a brief description of the literature from the F2 Lookup list and then click **OK**.

Editing Documents in the Literature Fulfillment Center

Use the following procedure to edit documents

1. Select **Go To>>Literature.**

2. At the Literature Fulfillment Center, highlight **Literature List** in the left pane.

    The documents are listed in the upper right pane.

3. Right-click the document to edit and select **Edit** from the local menu. The Literature dialog box appears.

4. In the **Output To** drop-down list, select one:

    •   **Stock.** Printed literature available as shelved stock.

    •   **Printer.** Literature to print from a file. Select the file path and click **Edit** to make changes.

    •   **FAX.** Literature to fax. Select the file path needed and click **Edit** to make changes.

5. In the **Type** field, type or select the literature type from the F2 Lookup list.

6. In the **Description** field, type or select a brief description of the literature from the F2 Lookup list. and then click **OK**.

Fulfilling or Rejecting Scheduled Literature Requests

When a Literature Request is assigned to you, the request appears on your calendar as **Lit** in the Task pane.

Use the following procedure to fulfill or reject scheduled literature requests

1. Select **Go To>>Literature.**

2. At the Literature Fulfillment Center, select your name in the **User** drop-down list to view requests assigned to you.

3. Select the **Literature Requests** date or date range for the request. The literature request appears in the upper right pane.

4. Highlight the literature request and right-click. Select options in the local menu.

5. To fulfill the request, note the attachments to send and select **Fulfill**.

    If a literature request is to be printed or faxed, the document is printed or faxed. Attachments are not sent automatically and must be handled as per your usual office procedure.

6. To reject the request, select **Reject.**

7. At the Rejection of Literature Requests dialog box, type or select the reason in the F2 Lookup list.

   If this activity was scheduled with an RSVP, GoldMine notifies the person who assigned it to you stating why it was rejected.

Fulfilled requests are moved from Pending to the History tab; the request appears in the **Printed Documents** area of the Literature Fulfillment Center.

Fulfilling or Rejecting Queued Documents

Queued Documents in the Literature Fulfillment Center come from the Document Management Center and were merged with one or more contacts. For multiple contacts, each contact is listed separately in the upper right pane when you select the assigned user and date the document was queued for.

Queued documents are fulfilled when using the **Print/FAX Server Agent**; to send the document immediately or remove it from the queue, use the **Queued Documents** area of the Literature Fulfillment Center.

Use the following procedure to fulfill or reject queued documents.

1. Select **Go To>>Literature.**

2. At the Literature Fulfillment Center, select your name in the **User** drop-down list to view requests assigned to you.

3. Select the **Queued Documents** date or date range for the request. The queued document appears in the upper right pane.

4. Highlight the document and right-click. Select options in the local menu.

5. To fulfill the print or fax request, right-click and select **Fulfill**.

   The document will print or send, depending on the settings configured.

6. To reject the request, right-click and select **Reject.**

7. At the **Rejection of Queued Document dialog box**, type or select the reason in the F2 Lookup list.

Fulfilled requests are written to the History tab; the request appears in the **Printed Documents** area of the Literature Fulfillment Center.

Editing Scheduled Literature Requests

Use this procedure to edit a Literature Request assigned to you

1. Select **Go To>>Literature Fulfillment.**

2. At the Literature Fulfillment Center, select your name in the **User** drop-down list to view requests assigned to you.

3. Select the **Literature Requests** date or date range for the request to act on. The literature request appears in the upper right pane.

4. Highlight the literature request, right-click, and select **Edit**.

    The Schedule a Literature Request dialog box appears.

About Telemarketing Scripts

Using GoldMine's branching scripts, a user can gather information by working through a series of interactive questions. Branching scripts organize questions in a flowchart-type format.

Use scripts to automate a variety of tasks such as guiding telemarketers through sales calls, collecting survey information, and training new salespeople.

Branching scripts are GoldMine's version of online questionnaires. With a branching script, telemarketers can deliver structured information to a prospect and, based on the prospect's response, work through a predefined dialog of related information.

Additional information can be designed to answer the customer's anticipated inquiries or provide requested information, so an accurate response to the customer's needs is readily available.

Each script question can contain an unlimited number of possible answers, and each answer can branch out to a different question. A script can contain up to 99 questions.

While the script is being executed, information on the prospect's responses can be saved in the Notes field of the active contact record or placed directly into one of the fields of the contact's record. Once this data is entered, filter expressions can be used to select contacts who responded similarly to script questions.

Branching Scripts Workflow

Before attempting to enter a branching script in GoldMine, map the entire script structure on paper. This strategy can be helpful in creating a branching script:

1. **Decide what questions to ask and the possible responses.** List questions with all the related responses directly below them. Draw lines connecting each response to the appropriate follow-up question. Note each question can have several response lines leading to it. However, no response should have more than one line leading from it (each response can only branch to one question).

2. **Number each question.** Try to select a numbering scheme that keeps questions in a natural sequence. If there are sub-branches within the script, you will have to jump numbers. A good rule to follow is to number the questions in a way that no answer leads to a lower-valued question. Number questions in intervals of 5 or 10 so additional questions can be inserted later in the script without having to change the numbering scheme.

3. **When all the questions are numbered, follow each question back to the preceding answer, and enter the question number next to the response.** These numbers are the **Goto** values entered into GoldMine.

4. **Determine if any questions should be omitted from the dialog.** Mark them on the worksheet.

5. **To store the text of a selected response in a field, enter the name of the field to be used next to the question number on the worksheet.** Most fields in the contact record can be used to store script responses.

Now you are ready to enter the script in GoldMine.

Creating Telemarketing Scripts

Use the following procedure to create a telemarketing script.

1. Select **Go To>>Scripts.**

   At the Script dialog box, click **Maintain Scripts**.

   The Branching Scripts Listing dialog box opens. It lists the script names in the main pane and the number of times it was run.

2. Click **New**.

   The Branching Scripts Profile dialog box opens.

Branching Scripts Listing Dialog Box

The following buttons appear on the Branching Scripts Listing dialog box:

- **New or Edit.** Opens the Branching Script Profile dialog box.

  Click **New** to create a telemarketing script.

- **Delete.** Removes the script.

- **Reset.** Resets the selected script statistics, including all response percentages, and the number of runs.

- **Close.** Exits the dialog box.

Branching Script Profile Dialog Box

The following options appear on the Branching Scripts Profile dialog box:

- **Number.** Determines the location of the script in the browse window. Lower numbered scripts appear higher on the list.

- **Script.** Descriptive title for the script.

- Existing questions display in the **Script Questions** pane.

  - **New.** Displays the **Branching Script Question** dialog box where you add a script question.

  - Click **New** to create a telemarketing script.

- **Edit.** Displays the **Branching Script Question dialog box** where you edit the highlighted script question's number, title, or responses.

- **Delete.** Deletes the selected script question.

Branching Script Question Dialog Box

When you select **New** or **Edit** from the **Branching Script Profile,** the Branching Script Question dialog box opens.

- **Title.** Descriptive title for the question that appears at the top of the question screen when the script is used.

- **Update field.** Optionally, you can select a field in the drop-down list to store the response to this question when the script is executed. When a field is used, GoldMine places the text of the response in the selected field in the contact record.

- **Notes.** Question and any other text to be delivered to the participant.

- **Question No.** The question number assigned to the script question.

  You should have selected a question number for each question when you designed the script. Enter numbers lower than 10 with a leading zero. For example, enter 1 as 01.

- **Save History.** Select this field to include the question's title and response in the script dialog text. If this field is cleared, the question is excluded from the dialog when the script is executed.

- **New.** Adds a response record.

  The Branching Script Answer dialog box appears.

- **Edit.** Edits a response. The Branching Script Answer dialog box appears.

- **Delete.** Removes the selected response.

Branching Script Answer Dialog Box

When you select **New** or **Edit** to add a response record, the Branching Script Answer dialog box opens.

- **Number.** The number of the response determines the position of the response in the listing. Lower number responses appear on the top of the list.

- **Goto.** Type the number of the question this response leads to. The Goto question number displays if this response is selected during script execution.

- **Answer.** Type the text of the response.

- **Prompt for response.** Select this field to prompt the operator to enter a response when this answer is selected.

  This option can be selected only when an entry is made in **Update** field in the Branching Script Question dialog box. The operator's response saves to the field specified by Update field.

  If the script question contains only one answer and that script answer has the **Response box** checked, GoldMine automatically displays the Enter Response dialog box, eliminating the need to select the answer.

After entering all the questions and responses into GoldMine, perform a test by running the script.

Using Telemarketing Scripts

Use telemarketing scripts to construct structured dialogs with customers.

1. Select **Go To>>Scripts.**

   The **Telemarketing Script dialog box** opens.

NOTE: All the responses you log while using the script are applied to the current contact record.

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2. Select the script in the **Script** drop-down list and begin asking questions. Update fields as needed.

Making and Answering Calls with SoftPhone

SoftPhone integration with GoldMine uses SIP (Session Initiation Protocol) and VoIP (Voice over IP) technology to place and answer contact calls. The SIP Proxy (not included with GoldMine) must be configured and its functionality verified by an administrator.

Your administrator can then configure GoldMine to make and receive calls through the SIP Proxy Server by setting SoftPhone preferences.

For more information on configuring Softphone, see the *Goldmine 8.5 Administrators Guide*.

Using SoftPhone

1. Select **Actions>>Call Contact>>Launch SoftPhone.**

   The SoftPhone control dialog box opens.

2. Use SoftPhone to **Answer** incoming calls, manually **Dial** phone numbers, **Transfer** calls, **Hang up,** place calls on **Hold**, and make **Blind Transfer** calls to another number or GoldMine user.

3. GoldMine reads the **phone1**, **phone2**, and **phone3** fields and pulls those numbers into the Contact Numbers area. Click a number to dial it.

> **NOTE:** UPHONE fields are user-defined fields GoldMine users can create and use as extra phone fields. If the name starts with UPHONE, GoldMine recognizes the field as an extra phone field.

4. After placing or receiving a call, adjust the speaker and microphone volume.
5. To use SoftPhone by default, select **Tools>>Options>>Telephony** and select **Use SoftPhone by default.**

About Personal Contacts

To keep a separate phone log for other important or commonly used telephone numbers, use the Personal Contacts feature to maintain a private file you can access easily while working in GoldMine. Only the user who created the file can access a Personal Contacts.

Use the following procedure to use Personal Contacts.

1. Select **Go to >Personal.**

   Your Personal Contacts dialog box opens.

2. Click **Dial** to use the Phone Dialer.
3. Click **New** to add a new entry.
4. Click **Edit** to change the selected entry.
5. Click **Delete** to remove the selected entry.
6. Click **OK** to close.

> **NOTE:** The Contact field must be limited to 30 characters.

Sales Management

About Sales Management

Plan, schedule, and record sales. Individuals can forecast sales they are responsible to close. Managers can assign and track sales quotas. GoldMine also provides the Opportunity Manager for a sales team to manage a complex sale composed of multiple components and participants.

Understanding Sales

A forecasted sale is an estimate to record the anticipated close date of a pending sale with one of your contacts. GoldMine stores potential sales information in the same database where it stores contact information.

When closing the sale, GoldMine moves the record into the contact's History tab. Scheduling and completing a forecasted sale is similar to scheduling and completing other types of activities. However, forecasted sales differ from other activities because they involve a product or service, an anticipated sale amount, and the probability of closing the sale.

Some transactions involve one salesperson and one client for a relatively brief period, while others involve multiple components and require the coordinated efforts of a team over a relatively long sales cycle. View sales on these levels:

- **Individual sales.** Assigned to a single user and involve the sale of a product or service to a single contact. GoldMine provides tools to schedule, or forecast, an individual sale. The tools also help managers assign and analyze sales quotas.

- **Complex sales.** Involve multiple participants over a longer period and typically involve multiple components of products or services bundled as a package; individual sales can be planned, tracked, and recorded as part of a complex sale. A complex sale is known as an opportunity.

Scheduling Forecasted Sales

A forecasted sale is an estimate to record the anticipated close date of a pending sale with one of your contacts. Forecasted sales are different from other activities because they include a product or service, an anticipated sale amount, and the probability of the sale closing.

Use the following procedure to schedule a forecasted sale.

1. With the contact to scheduling for active on the screen, select **Schedule>>Sale.**

   The Schedule a Forecasted Sale dialog box opens.
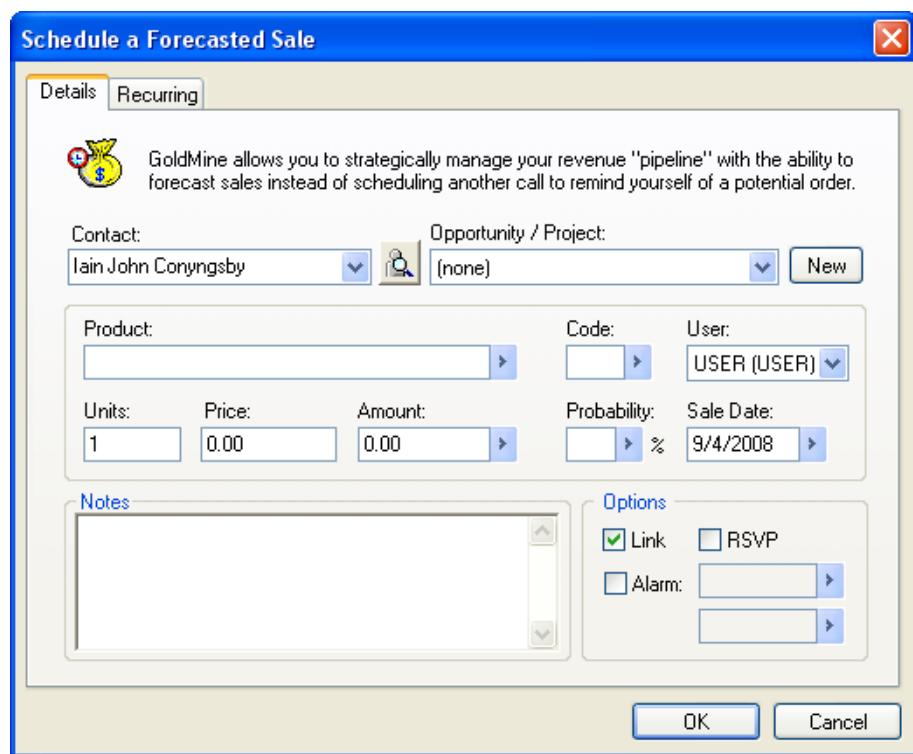
   The **Contact** field is populated with the Contact VIN#.

2. To select another contact, click on the **Contact** drop-down arrow and select the contact or click the right-facing arrow to launch the Contact Search Center and search for a new contact.

3. In the drop-down list, select the **Opportunity/Project** to associate the sale with or click **New** to create a new opportunity or project.

4. At the **Product** field, select the product in the F2 Lookup list.

5. At the **Code** field, select the code in the F2 Lookup list.

   Activity codes can be used later to analyze specific sales activities. For example, if you code all your forecasted sales that were referrals with an activity Code of REF, you can determine how many referred sales you made during a specific period of time.

6. At the **User** field, select the user who will schedule the forecasted sale. The forecasted sale appears on the user's calendar.

7. At the **Units** field, type the expected number of product to purchase.

8. At the **Price** field, type the price of each unit.

   The unit amount value and price per unit value are calculated in the **Amount** field.

9. At the **Probability** field, select a percentage value in the F2 Lookup list.

   For example, if the customer is evaluating the product, select 50%. If the customer is purchasing, select 90%.

10. At the **Sale Date** field, select the expected sale date in the F2 Lookup graphical calendar.

11. In the **Notes** field, type any notes about the sale.

12. Click on the **Link** checkbox to link this forecasted sale to the current contact.

13. Click on the **RSVP checkbox** to be notified when the assigned user completes the sale.

> **NOTE:** GoldMine posts RSVP messages on the Activity List when the sale completes by the assigned user. The RSVP record provides information about the outcome of the sale.

14. Click on the **Alarm** field if you want GoldMine to warn you when the activity is due.

   • To set a time for the alarm, click the upper down-arrow box and select the time.

   • To set the date for this alarm, click the lower down-arrow box and select the date.

15. Click **OK** to save and close the dialog box, or select the Recurring tab to schedule recurring activities

Completing Forecasted Sales

Complete forecasted sales from a contact's Pending tab or the Activity List.

Use the following procedure to complete a forecasted sale.

1. Right-click the sale and select **Complete,** or select **Complete>>Sale**. The **Complete a Sale** dialog box appears.
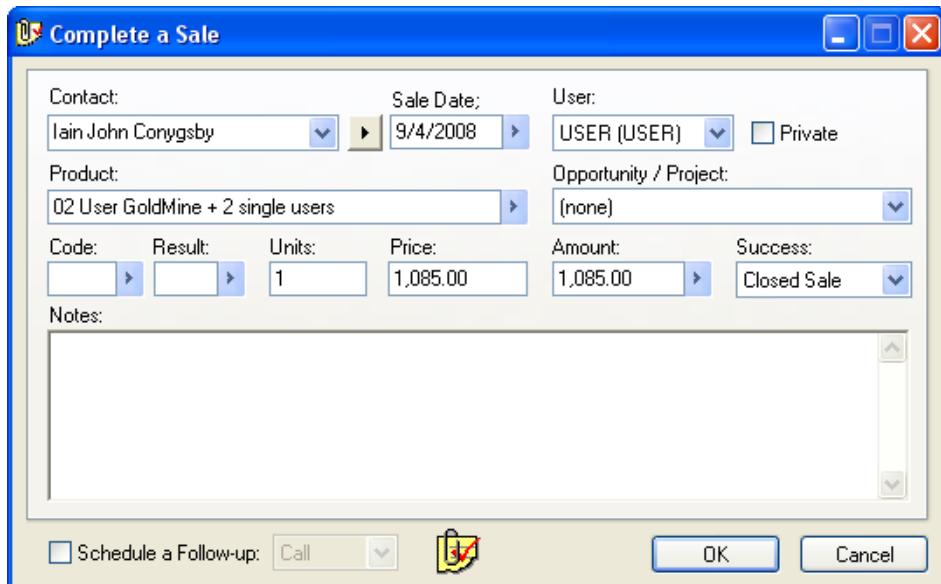
2. Click the **Contact** drop-down arrow to select from additional contacts; or click the right-facing arrow to launch the **Contact Search Center** and search for a new contact.

3. Select the **Sale Date** using the F2 graphical calendar.

4. Select the **User** completing the action.

5. Select **Private** if the completed action will be available only to the selected user.

6. Select the **Product** in the F2 Lookup list.

7. In the drop-down list, select the **Opportunity/Project** to associate the sale with.

8. Select the **Code** from the F2 Lookup list.

9. Select the **Result** code from the F2 Lookup list.

10. Type the number of product **Units** sold.

11. Type the **Price** of each unit.

12. The **Amount** field automatically calculates the total based on the entries in the Units and Price.

13. At the Success drop down list, select **Closed Sale** or **Lost Sale**.

14. Type any **Notes** related to the sale.

15. To schedule a follow-up activity, click on the **Schedule a Follow-up** checkbox and select the activity from the drop-down list and then click **OK**.

16. After completing a sale, GoldMine changes the forecasted sales record into a history record. View the record in one of these:

- **Contact record.** The sales record moves from the Pending tab to the History tab.
- **Activity List.** The sales record moves from the Forecasts tab to the Closed tab. Also see the completed sales record in the Real-Time tab.
- **Calendar.** If you configure the Calendar to show completed forecasted sales, the sale record appears in the Day tab or the Week tab on the date completed.

Using Forecasted Sales Analysis

Generate an analysis of the forecasted sales activities in the database.

1. Select **GoTo>>Analysis>>Forecast Analysis tab** and right-click on an open **Activity List**.

2. Select **Analyze.**

The Forecasted Sales Analysis dialog box opens.
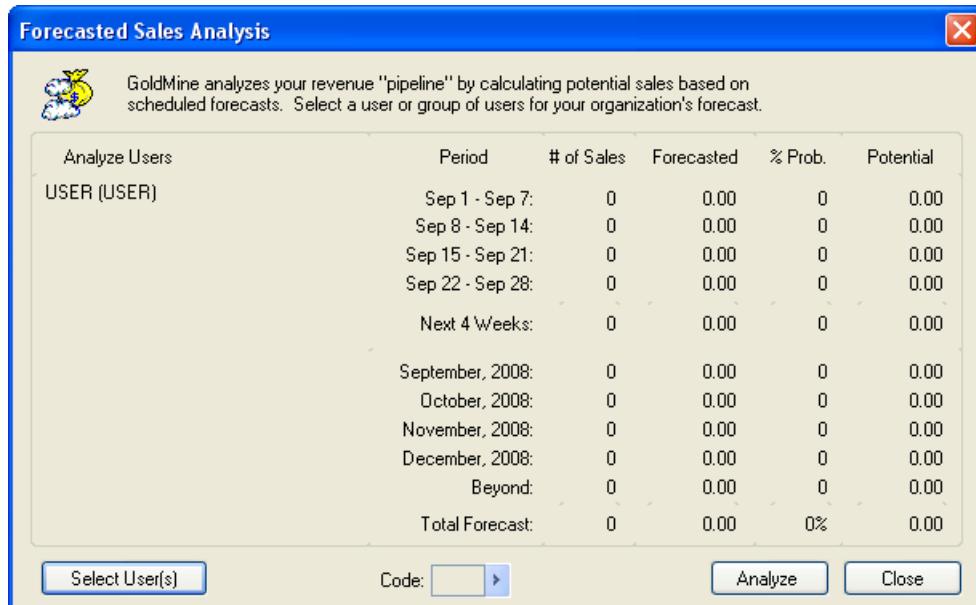
The Forecasted Sales Analysis dialog box provides this information about projected sales or cash flows for individuals, groups of individuals, or the entire organization:

- **Analyze Users.** The users included in the analysis; your username displays by default. To add or change the analyzed users, click Select User(s).

- **Period.** Forecasted sales statistics divided into several periods. The top portion of the analysis screen shows forecasted sales statistics by week, for the next four weeks. Total amounts for the four week period display below the weekly section. Below the weekly section, forecasted sales for the next four months are broken down by month. The Beyond line includes forecasted sales scheduled to close after the next four months. Grand totals for the lower section display at the bottom of the screen.

- **# of Sales.** The total number of forecasted sales activities scheduled on the calendar for the period.

- **Forecasted.** The total dollar amount of sales scheduled on the calendar for the period.

- **% Prob.** The average probability of a sale closing in this period (calculates by averaging values in the Probability field for all Forecasted Sales activities scheduled in the period).

- **Potential.** The expected value (or weighted value) of sales closing in this period. This value is determined by multiplying the total forecasted sales amount (Forecasted) by the average close probability (% Prob).

  - **Select User(s).** The Select Users dialog box, from which you can select GoldMine users for activity analysis.
  - **Code.** Forecasted sales with the entered activity code. Use wild cards to select multiple activity codes. By default, this field is blank to include all activity codes in the analysis.
  - **Analyze.** Calculates the totals in the display.
  - **Close.** Closes the dialog box.

Using Graphical Analysis

The GoldMine Graphical Analysis tool generates summary graphs of user activity data based criteria. You can display data as a bar graph or a line graph. GoldMine can represent all activity for a period of time, or one of several types of activities. Graphs can also represent total activities, a comparison of all users, or selected users.

Use the following procedure to generate a forecasted sale.

1. Select **Go To>>Analysis>>Graphical Analysis.**
2. The **Graphical Analysis Options** dialog box contains options determining the time range and activities to include in the graph. Select the options you need:
   - **Complete.** Completed activities.
   - **Scheduled.** Scheduled activities.
   - **Totals.** Total activity data for specified users.
   - **Comparison.** Activity data for individual users as specified.
   - **Bar Graph.** Comparison of different periods or users.
   - **Line Graph.** Trends over time.
   - **Select User(s).** Accesses a list of users. If the Comparison option is selected under Graph Type and more than one user is selected, data for these users displays on one graph with color-coded entries to differentiate users.
   - **All Activities.** Scheduled or completed data for the activity types described below.

3. At the **Activity types** field, select an activity.

Graphical representations depend on whether **Completed** or **Scheduled** is selected under Graph Type):

- **Call Backs.** Graph for completed or scheduled Call Backs.
- **Messages.** Graph for completed or scheduled Messages.
- **Next Actions.** Graph for completed or scheduled Next Actions.
- **Appointment.** Graph for completed or scheduled appointments.
- **Sales.** Graph for completed or scheduled sales.
- **Others.** Graph for completed or scheduled other actions.
- **High End.** Type a numeric value corresponding to the uppermost number to display on the graph's vertical axis. For example, if experience shows users rarely schedule more than 30 appointments per week, entering 30 in the High End field generates a graph with a vertical axis ending at 30. The default, zero (0), lets GoldMine generate the high end value based on included data.
- **Low End.** Type a numeric value corresponding to the smallest number to display on the graph's vertical axis. For example, if experience shows that users have never scheduled fewer than five call backs per week, entering 5 in the Low End field generates a graph with a vertical axis starting at 5.0. The default is zero (0).
- **Activity Cd.** Generates the graph from activity records with the specified Activity Code. Use wild cards to select multiple activity codes. By default, this field is blank to include all activity codes in the graph. For more information, see "Using Wild Cards in Activity and Result Code Fields" on page 255.
- **Result Cd.** Type a Result Code to use as the basis for graph data. Only activity records with this Result Code are included in the graph. Use wild cards to select multiple activity codes. The default value for this field is blank to include all result codes in the generated graph. This field is available only if Completed is selected for Graph Type.
- **From Date.** Beginning date from which data is graphed. The default is the current date. This field is available only for a graph of scheduled activities; the ending date for scheduled activity graphs is always the current date.

- **To Date.** Ending date of data being graphed. The default is today's date. This field is available only for a graph of completed activities; the beginning date for completed activity graphs is always today's date.
- **From Time.** Beginning time included in the graph. The default is 12:00 am. When combined with the default To Time entry of 12:00 am, the graph displays data for a 24-hour period. This field is unavailable when generating hourly graphs for completed activities.
- **To Time.** Ending time included in the graph. The default is 12:00 am. When combined with the default From Time entry of 12:00 am, the graph displays data for a 24-hour period. This field is unavailable when generating hourly graphs for scheduled activities.
- **Show Grid**. Displays lines representing the horizontal axis of the graph (default). To generate a graph without this grid, clear the option.

4. Click **Graphs** to generate a graph.

Based on your selection in the Graph Type area of the Graphical Analysis Option dialog box, you see a bar or line graph.

5. To return to the **Graphical Analysis Options** dialog box from the graph display, click **Options**.

Using Wild Cards in Activity and Result Code Fields

GoldMine recognizes the **asterisk** (*)character as a wild card in the **Activity Code** or **Result Code f**ields on an analysis screen, When placed in these fields, an asterisk tells GoldMine, "This position can contain any character".

For example, entering **S*S** in the Activity Code field makes GoldMine calculate the analysis based on any activity code with **S** in the first and last positions of the Activity Code field. The second character in this field can be any character in the history or calendar records being analyzed. To calculate all activity codes that begin with S, enter **S**** in the Activity Code field.

Using Leads Analysis

Managers can track valuable information on the status of sales efforts and the effectiveness of advertising and promotional efforts in generating inquiries and sales. GoldMine, then, becomes a strategic asset by providing timely and accurate information helping managers make better decisions on deploying resources.

You can use Leads Analysis to:

- Track valuable information on the status of sales efforts and analyze the effectiveness of advertising and promotional efforts in generating inquiries and sales.

- Generate a list of the values in any Contact1 or Contact2 field; typically, analysis is performed on values in the Source field.

- Calculate a number of statistics for each unique value, such as the number of Contact Records (leads) containing a unique Source field value.

To Use Leads Analysis

1. Select **View>>Analysis>>Leads Analysis**. The Leads Analysis dialog box appears.

2. To add, edit, or delete a leads analysis, click **Maintain**. The Open Leads Analysis File dialog box appears.

3. Select the lead file you are analyzing in the **File Description** drop-down list.

> **NOTE:** You can use the local menu to change display and other options.

4. The information pane displays these columns:

- **Source**: Name of the lead source, such as Comdex. This entry appears in the Source field of the contact record. Use the source to determine the profitability of individual marketing sources or groups of campaigns. GoldMine can report the total number of leads generated from seminars, advertisements, or trade shows in the Source field; the total sales volume generated from each source value; and the potential sales pending from each source value. Then identify effective lead sources based on total leads or sales volume generated. Also, to know the cost of each lead, calculate profit and locate the most profitable lead source. For example, this tool helps you determine whether to run an ad again.

- **Leads**: Total number of contact records in the database with this value in the selected field.

- **Closed**: Total number of contact records with this source that have at least one purchase, as recognized by the presence of a sales activity record in the history file.

- **Ratio**: Percentage of closed sales based on number of leads.

- Sales: Total dollar amount of sales generated by this lead source. This value is a sum of all sales activity history records linked to the Contact Records with this source.

- **Potential**: Total dollar amount of future sales activities scheduled on the Calendar (calculated by summing all Forecasted Sales calendar records linked to the contact records with this source).

> **NOTE:** Also view **Cost and Profit**, and **Cost and Price per lead**. To view the other options, right-click in the information pane and select **View**.

5. To locate a source, type the first few letters of the source in the Find Source text box.

6. Also use these options:
   - **Analyze**: Displays the Leads Analysis - Analyze dialog box. Regenerates the leads analysis information for the current leads analysis database. Select the field on which to base the analysis, and the range of dates to scan for statistic calculation.
   - **Sort**: Displays the Leads Analysis Sort Menu dialog box to select the ordering of the records in the Leads Analysis dialog box.
   - **Zoom**: Displays complete information about the highlighted leads analysis record in the Leads Analysis Zoom dialog box.
7. Click **Close** to close the Leads Analysis dialog box.

Using Quota Analysis

Use the Quote Analysis to review the status of sales efforts by analyzing how sales team members are meeting quota for a specified period. This analysis uses data about the assigned quota, forecast sales, completed sales, and lost sales to derive a percentage of quota or a percentage of forecast sales attained by a salesperson. Because GoldMine analyzes data by period, a process record for each salesperson can be seen using listings over multiple periods.

1. Select **Go To>>Analysis>>Quota Analysis.**

   The **Quota Listing** dialog box opens.

2. Select an option from the **Quota Listing** dialog box:
   - **User.** An entry for each user assigned a quota in the Quota Profile dialog box. Users have an entry for each period they were assigned a quota.
   - **Period.** The range of dates comprising the quota period. By default, GoldMine defines a quota period as one month, but the period can be changed in the Quota Profile dialog box.
   - **Quota.** The dollar amount of expected sales assigned to the user for the period.
   - **Forecast.** The total dollar amount of sales scheduled on the calendar for the period.
   - **Closed Sales.** The total dollar amount of sales recorded as Closed Sales when the forecasted sales activities are completed.
   - **Lost Sales.** The total dollar amount of sales recorded as Lost Sales when the forecasted sales activities are completed.

- **Quota Period.** By default, GoldMine sorts quota entries by the calendar period for quota assignments. When a user has entries for multiple quota periods, the listings appear in chronological order (the oldest quota assignment appears first, and the most current quota assignment appears last).
- **User.** Alphabetize quota entries by username. Multiple quota entries for a User appear in chronological order.
- **Quota.** By default, GoldMine uses data in the Quota, Forecast, Closed Sales, and Lost Sales columns to calculate the percentage of quota achieved by the salesperson during the period. The percentage of successfully completed sales to assigned quota appears in the Closed Sales column, while the percentage of unsuccessful sales appears in the Lost Sales column.
- **Forecast.** Calculates the percentage of forecasted sales against sales already completed during the period. The percentage of successfully completed sales to forecasted sales appears in the Closed Sales column. The percentage of unsuccessful sales appears in the Lost Sales column.
- **New.** Access the Assign new quota dialog box to assign a quota to a user for a defined period.
- **Delete.** Deletes the highlighted record for the salesperson.
- **Edit.** Access the Quota Profile dialog box to modify a previously assigned quota.

3. Select **Close** to exit the dialog box.

Using Sales Analysis

GoldMine can generate a summary analysis of sales performance by one or more individuals. This analysis displays actual numbers and percentage-of-goal figures for quotas, forecast sales, and closed sales for a specified period of time.

1. Select **Go To>>Analysis>>Sales Analysis.**

The Select Users dialog box appears on top of the **Sales Analysis** dialog box to select the users to analyze. Select users or groups of users if necessary.

2. Configure the following options:

- **From Date.** Sets the first date of the period to include in the analysis.
- **To Date.** Sets the last date of the period to include in the analysis.

To reflect an accurate quota amount, type **From** and **To** dates corresponding to the quota periods defined in the Quota Profile.

- **Quota.** Displays the dollar amount of expected sales assigned to the user for the specified period.
- **Forecast.** Displays the total dollar amount of sales scheduled on the calendar for the specified period.
- **Closed Sales.** Displays the total dollar amount of sales recorded as Closed Sales when the forecasted sales activities are completed.
- **Quota Diff.** Displays the difference between Closed Sales and Quota amount (Quota Diff. = Closed Sales - Quota). Negative values are shown in parentheses (). See the examples below:

  If Closed = Quota, Diff = 0

  If Closed < Quota, Diff < 0%(Negative amounts should be shown in parentheses)

  If Closed > Quota, Diff > 0

- **Quota Diff. Percentage.** The Quota Diff. Percentage is the difference between Closed Sales and Quota amounts in percentage of Quota value for the specified period. The equation is:

  Quota Diff. Percentage = (Closed Sales - Quota) * 100% / Quota

  - 0% indicates that Closed Sales and Quota values were equal for the specified period.
  - Negative/positive values mean that Closed Sales were less/more then Quota correspondingly. Absolute value of this parameter can be used as one of indicators of Sales Planning Efficiency.
  - Negative values are shown in parentheses ().

    Examples:

    Quota Diff. Percentage = ($9,000 - $10,000) *100 / $10,000 = (-10%); Closed Sales were 10% less then Quota;

    Quota Diff. Percentage = ($15,000 - $10,000) *100 / $10,000 = 50%; Closed Sales were 10% more then Quota.

- **Forecast Diff.** The Forecast Diff. is the difference between Closed Sales and Forecasted Sales amount for the specified period. The equation is:

  Forecast Diff. = Closed Sales - Forecasted Sales

  - Negative values are shown in parentheses ().

    Examples:

    Forecast Diff. = $9,000 - $0 = $9,000; Forecasted Sales trail Closed Sales by $9000

    Forecast Diff. = $1,500 - $2,000 = (-$500); Forecasted Sales exceed Closed Sales by $500

    Forecast Diff. = $9,000 - $9,000 = $0; Forecasted Sales equal Closed Sales.

- **Forecast Diff. Percentage.** The Forecast Diff. Percentage is the difference between Closed Sales and Forecasted Sales amounts in percentage of Forecasted Sales value for the specified period.The equation is:

  Forecast Diff. Percentage = (Closed Sales - Forecasted) * 100% / Forecasted

  - 0% indicates that Closed Sales and Forecasted values were equal for the specified period.

  - Negative/positive values mean that Closed Sales were less/more then Forecasted correspondingly. Absolute value of this parameter can be used as one of indicators of Sales Planning Efficiency.

  - Negative values are shown in parentheses ().

    Examples:

    Forecast Diff. Percentage = ($0 - $9,000) *100 / $9,000 = (-100%); No revenue stream;

    Forecast Diff. Percentage = ($1,400 - $1,000) *100 /$1,000 = 40%; revenue stream exceeds Forecasted Sales by 40%

- **Activity Cd.** When an activity code is entered in this field, GoldMine includes only those forecasted sales and closed sales with the specified activity code. When the field is left blank, GoldMine includes all forecasted sales and closed sales.

- **Result Cd.** When a result code is entered in this field, GoldMine includes only those forecasted sales and closed sales with the specified result code. When the field is left blank, GoldMine includes all forecasted sales and closed sales.
- **Select User(s).** Displays the dialog box to select GoldMine users for a new analysis.
- **Analyze.** Calculates the totals in the display.
3. Click **Close** to close the Sales Analysis dialog box.

Using Statistical Analysis

The Statistical Analysis of Completed Activities dialog box displays completed activity information for an individual user, a group of users, or on a system-wide basis. The analysis of completed activities can provide useful insight into your performance or the performance of others in your organization.

Use the following procedure to use the Statistical Analysis of Completed Activities wizard.

1. Access the Statistical Analysis in one of two ways:
   - From a user's completed activities on the Activity List's **Closed** tab. From the local menu, select **Analyze**.
   - By selecting **Go To>>Analysis>>Statistical Analysis**.
2. The Statistical Analysis of Completed Activities dialog box opens.
3. Select from the following options:
   - **Select User(s).** Displays the Select Users dialog box to select GoldMine users for activity analysis. The list box below the button displays users to include in the analysis; your username displays by default.
   - **From Date.** Sets the first date of the period to include in the analysis.
   - **To Date.** Sets the last date of the period to include in the analysis.
   - **Activity Cd.** When an activity code is entered in this field, GoldMine includes only those completed activities with the specified activity code to be analyzed. When the field is left blank, all completed activities are included. For example, if you code your activities as billable or non-billable, enter the activity code for billable activities and get an analysis of these activities only.

- **Result Cd.** When a result code is entered in this field, GoldMine includes only those completed activities with the specified result code to be analyzed. When the field is left blank, all completed activities are included.
- **Phone Calls Analysis.** Total number of completed telephone calls of the specified type in the history file. Call-backs, outgoing calls, incoming calls and returned messages are shown, as well as the total duration of calls in each category. GoldMine displays the average duration of calls below the grand totals line for this section. Successful Calls shows the number and percentage of calls with a satisfactory outcome, while Unsuccessful shows the telephone calls without a satisfactory outcome.
- **Activities Analysis.** Total number of completed activities in the history file, including to-do actions, received messages, appointments, and other activities.
- **Sales Analysis.** Completed sales statistics. Closed Sales shows the total number of completed sales activities in the history file. The total value of each sale prints on the right. % of Calls Closed compares the number of completed sales as a percentage of completed call activities. The average sales value per completed call activity also displays.
- **Analyze.** Calculates the totals in the display.
- **Close.** Closes the dialog box
- **Print.** Prints analysis results.

About Territory Realignment

GoldMine enables you to reassign large groups of contacts and scheduled activities from one user to another. Use the **Territory Realignment Wizard** to manage dynamic sales territories, assign existing contacts to a new sales representative based on user-defined criteria, or change the contact base for a sales representative reassigned to a different territory.

Then select settings for synchronization, updating the databases of sales representatives working in the field.

Use the Territory Realignment Wizard to:

• Assign a set of existing contacts to users based on a filter or group

• Reassign activities from one user to another user

• Globally update fields relevant to a territory realignment

• Set up synchronization to update the databases of remote users affected by the realignment

> **WARNING:** It is strongly recommended that you back up data before performing territory realignment.

> **NOTE:** Note: To reassign contacts and scheduled activities, build a filter or group containing the contacts associated with the sales territory to be realigned. If no filter or group exists, create one now.

By default, GoldMine tracks and stores the filtered records included in the last synchronization session's transfer set for a remote site based on the Territory Realignment. By performing this filter qualification process, GoldMine automatically includes records with changes affecting Territory Realignment in the current synchronization session. This ensures the remote sites update on the next synchronization.

Using the Territory Realignment Wizard

The Territory Realignment Wizard reassigns contacts and scheduled activities.

Use the following procedure to use the territory realignment wizard.

1. Select **Tools>>Data Management>>Territory Realignment.**

2. At the **Territory Realignment Wizard,** click **Next.**

3. At the Filter Selection dialog box, select the filter or group in the drop-down list.

   To change the filters or groups to those of a different owner, select **<Filters of:> or <Groups of:>.**

   • At the Select a User dialog box, select the user in the drop-down list and click **OK** to return to the filters and groups drop-down list.

4. Select the filter or group and click **Next.**

5. At the **Replace dialog box,** replace the data in up to two fields and change the owner in the third.

6. In the **Replace** drop-down list select the field to replace.

   In the **with** field, type or select the value to appear in that field.

7. In the third **Replace** field you can reassign record ownership. Select **Owner** in the drop-down list.

   In the **with** text box select the new user or user group to which you are assigning ownership of the contacts.

   > **NOTE:** Territory Realignment changes the owner but not the curtaining level. To globally change record curtaining, see Technical Document 362, "Using the Global Replace Wizard" at support.frontrange.com

8. Click **Next.**

To Reassign the Activities of a Particular User

1. To reassign the activities of a particular user, select the user's name in the **Reassign the activities of this user** drop-down list.

2. In the **To this user** drop-down list, select the new user who will be responsible for the activities.

3. In the **Activities ranging from date f**ield, type or select the starting date from the F2 graphical calendar.

4. In the **to date** field, type or select the ending date from the F2 graphical calendar.

5. In the **Please select the activity types to reassign to the new user** area, specify the activities to be reassigned. The View types are:

   - **Call Backs.** Scheduled, outgoing telephone calls to make sometime in the future.

   - **Messages.** Scheduled e-mail messages.

   - **Next Actions.** Scheduled manual tasks such as sending literature, delivering samples, shipping products, and so on.

   - **Appointment.** Scheduled, date-specific meetings with contacts. Can also schedule conference calls.

   - **Literature Request.** Scheduled fulfillment and shipping of brochures, price lists, and other mass-printed documentation to one or more contacts.

   - **Forecasted Sales.** Scheduled activities indicating the anticipated close date of a pending sale with one of your contacts.

   - **Other Actions.** Miscellaneous activities falling outside the other activity categories defined in GoldMine.

   - **To-do.** Priority-ranked activities without an activity date appear on a separate To-do list, rather than the date-based Scheduled Activities windows.

     > **NOTE:** By default, GoldMine does not link To-Do activities. Each To-Do activity is forwarded daily.

   - **Event.** Date-specific activities scheduled for one or more days such as conferences and conventions.

6. Select **Reassign unlinked activities** to include the user's scheduled activities not linked to a contact record.

7. Click **Next** and then click **Finish.**

Opportunity and Project Management

About the Opportunity and Project Managers

Sales processes often involve multiple contacts and multiple organizations. GoldMine offers two systems for handling the processes:

- **Project Manager.** Oversees complex, long-term projects with multiple components. Projects are usually not related directly to a particular sale, although they can be converted to an Opportunity when it becomes apparent that a project has become a sale. The Project Manager window contains relevant information needed to track a long-term project involving the same components and contacts as a large sales opportunity.

- **Opportunity Manager.** Lends itself to a complex sales process involving a group of users working as a team with multiple organizations and contacts. The sale may involve multiple products or services as a package deal where the customer purchases a part of the package but renegotiates other parts into a different package. The Opportunity Manager window contains relevant information needed to track a medium-to-long sales cycle involving multiple contacts, issues, and activities.

Use the Opportunity and Project Manager windows to view details of the opportunity or project from initial contact to a closed sale. The sales team can view summary and detailed information about forecasted sales and activities linked to the opportunity. As the project or opportunity progresses, a complete record of associated activities ensures the team is making a coordinated effort to complete the sale. The team can also see the decision makers and linked contacts in the project and act accordingly.

Customizing the Opportunity and Project Managers Properties

Opportunity and Project share the same table, fields, and user-defined fields. Modify the field labels or reorder and hide tabs of an opportunity listed in the Manager.

Use the following procedure to customize the opportunity and project properties or contact your administrator.

1. Select **Go To>>Opportunities**, or click **Opportunities** on the Navigation Pane.

    The **Opportunities** window opens.

    •   To customize Project Manager, select **Go To>>Projects,** or click **Projects** on the Navigation Pane.

        The Projects Manager window opens.

2. Select a listed opportunity or project. and click **Customize**.

3. At the **Opportunity Manager Customization Properties** dialog box, click the **Fields** tab and select from these options:

    •   **New.** Creates a new user-defined field on the Opportunity/Project Properties dialog box.

        Click New. At the **User Defined Field Profile** dialog box enter the Field Name, Description and select a field type.

        •   **Character.** A character field.Select the length of the field in the **Len.** drop-down list.

        •   **Numeric.** A numeric field. Select the number of decimals in the **Dec.** drop-down list

        •   **Date.** A date field.

    •   **Edit.** Edits a user-defined field.

        Click Edit. At the **User Defined Field Profile** dialog box enter the Field Name, Description and select a field type.

        •   **Character.** A character field.Select the length of the field in the **Len.** drop-down list.

        •   **Numeric.** A numeric field. Select the number of decimals in the **Dec.** drop-down list

        •   **Date.** A date field.

- **Delete.** Deletes a user-defined field. Click Delete and click **Yes** at the message.
- **Move Up.** Reposition the selected field above other fields. Select a field and click Move Up. The field moves up one position
- **Move Down.** Reposition the selected field below other fields. Select a field and click Move Down. The field moves down one position.

4. Click the **Labels** tab**.** Allows you to change the name of a label.
   - In the **Default Label** list, find the label name you want to change. Click once next to the field (under the **New Label** list). A text box opens.
   - Type in the new label name and click **OK**.
   - At the message click **Yes**.

5. Click the **Tabs** tab. Select from the following options:

> **NOTE:** For each tab title listed, clear the associated checkbox to hide tab from view.

- **Move Up.** Repositions the tab. Select a tab and click Move Up. The tab moves up one position.
- **Move Down.** Repositions the tab. Select a tab and click Move Down. The tab moves down one position.
- **Customize tab labels globally.** Applies changes to all users. Select the checkbox if you want changes to apply to all users.
- **Rename.** Renames the tab. Select a tab and click Rename. At the **Edit Tab** label dialog box, type in the new tab label and click **OK**. The new tab name appears.
- **Reset.** Return the tabs to default order.

6. Click the **Options** tab and select the **When adding a New Opportunity/ Project, prompt the user to use either the wizard or the manual method** checkbox and then click **OK.**

Using the Opportunity Manager

Use the Opportunity Manager to oversee complex sales involving many components. The Opportunities tab in the lower pane of the contact record displays the opportunities associated with the contact.

1. Select **Go To>>Opportunities.**

2. At the **Opportunity Manager,** use the toolbar functions to perform general actions and the local menu for other actions.

3. To view the opportunities assigned to a user, user group, or (all), select the user in the **Manager** drop-down list.

4. To narrow displaying opportunities, select the **Status** in the drop-down list. The results are based on win/lose processing and not on any user-defined status options assigned to the opportunity.

5. To create a new opportunity, right-click the upper pane and select **New**. See "Creating Opportunities" on page 271.

6. Manage Opportunity details using elements located in these tabs:

    • **Influencers.** Contacts associated with the opportunity.

    • **Products.** Products or services you are pursuing as a sales opportunity.

    • **Tasks.** Schedule a plan of action with specific tasks assigned to users or user groups.

    • **Team.** GoldMine users and contacts contributing to the opportunity.

    • **Issues.** Possible roadblocks to the successful completion of the opportunity.

    • **Notes.** Type free-form notes related to the opportunity.

    • **Competitors.** Create a list of companies that are competitors for the sale.

- **Details/Links.** Simple details and allows you to link documents.
- **Pending.** Scheduled activities for the opportunity.
- **History.** Completed activities for the opportunity.

> **TIP:** To sort opportunities or projects in alphanumeric order by one of the column criteria, click the column label. For example, to list records in alphabetical order by company name, click the **Company** label.

7. To complete an opportunity, select the opportunity, right-click, and select Win or Lose.

Creating Opportunities

Use the following procedure to create an opportunity in the Opportunity Manager.

1. Select **Go To>>Opportunities.**

2. At the Opportunity Manager window click **New** on the Opportunity Manager toolbar

or

Right-click and select **New>>New Opportunity** from the local menu.

3. At the New Opportunity Prompt dialog box, click:
- **Yes.** The Opportunity Wizard opens. (See "Using the Opportunity Wizard" on page 274 to continue this procedure.)
- **No.** The New Opportunity dialog box appears. Go to step 4.

4. Configure these settings:
- **Company**. The company in the current contact record populates this field. To change the contact, click the Search button and select a company from the Contact Search Center.
- **Contact.** Select the primary or additional contact in the drop-down list. Available contacts are those associated with the selected company.

   The Contact field label will change according to the type of record selected. For example, if the selected record type is **Car,** then the field label will appear as **VIN#** with a drop-down list of Vehicle Identification Numbers.

- **Type.** Defaults to Opportunity and cannot be changed in this dialog box.
- **Templates of User.** Select the user who is the owner of the template.
- **Please select a template of the selected user.** Select a template in the drop-down list. See "Creating Opportunity Templates" on page 273.

5. Click **OK.**

6. At the Opportunity Properties dialog box, select:
   - **Opportunity.** Change the opportunity name as needed.
   - **Company.** Defaults to the company selected on the previous dialog box. Type a new company name, as needed.
   - **Manager.** Select the user who will be the opportunity manager in the drop-down list.
   - **Code.** Select the opportunity code by typing or clicking the F2 Lookup arrow.
   - **Status.** Type or select from the F2 Lookup list.
   - **Stage**. Type or select from the F2 Lookup list.
   - **Source.** Type or select the opportunity source from the F2 Lookup list.
   - **Units.** Type the number of units forecast for the opportunity.
   - **Price.** Type the price per unit.
   - **Probability.** Type or select the percentage from the F2 Lookup list.
   - **Forecast.** Automatically calculates a forecasted sale amount based on the Units and Price; or type or select the forecasted sale amount from the F2 Lookup list.
   - **Closed Amt.** Updates with the final amount of a successfully closed sale based on the forecasted amount.
   - **Start Date.** Select the date the opportunity starts from the F2 graphical calendar.
   - **Close by**. Select the date the opportunity should end from the F2 graphical calendar.
   - **Actual Close.** Defaults to the date displayed in End Date. Updates when the opportunity is actually completed.

7. Click **OK** to return to the Opportunity Manager window with your new opportunity in the upper pane.

8. Each tab must be updated manually. See "Using the Opportunity Manager" on page 270.

Creating Opportunity Templates

Use the following procedure to create an opportunity template.

1. Select **View>>Sales Tools>>Opportunities**.

   The Opportunity Manager window opens.

2. Click the **Toggle to Show Templates** button .

   The upper pane switches to the opportunity templates, and the first column is labeled Opportunity Template.

3. Right-click and select **New** from the local menu. The Opportunity Templates Properties dialog box opens.

> **NOTE:** The settings you configure in the template are used when an opportunity is created based on the template. Carefully consider the settings, for example, the Acct. Manager becomes the default owner and therefore the default Manager of the opportunity. Users can change the settings as they create the opportunity.

- **Template Name.** Type the name of the template or select a name in the F2 Lookup list.
- **Acct. Manager.** Select the user or user group in the drop-down list.
- **Code**.Type or select a code in the F2 Lookup list.
- **Default Status.** Type or select the starting status for the opportunities created using this template.
- **Default Stage.** Type or select the beginning stage for the opportunities created using this template.
- **Source.** Type or select the source of the opportunity.
- **Probability.** Select the percent opportunities should begin at.
- **Revenue**. Type or select the expected revenue for the template type. When you create an opportunity based on the template, the information in the Revenue text box populates the Forecast text box on the Opportunity Properties dialog box.

- **Number of days to close.** Type or select the number.
- **Task dates to be based.** Select the date entered for tasks set up for the opportunity. This date appears in both the Start Date and End Date fields of the Task dialog box.

4. Click **OK** to save and close.

Using the Opportunity Wizard

Use the Opportunity Wizard to create a sales opportunity and configure the basic information.

1. Select **Go To>>Opportunities.**
2. At the Opportunity Manager, **r**ight-click the upper pane and select **New.**
3. At the New Opportunity Prompt dialog box, select **Yes** to view the Opportunity Wizard: Welcome dialog box.

   If you click **No**, the New Opportunity dialog box opens.

The Company field defaults to the active contact record. Click the **Search** button to launch the Contact Search Center and then select the new contact record.

4. Contacts and additional contacts available in the **Contacts** drop-down list are associated with the selected company. Select the contact for the opportunity and click **Next**.

5. At the Description dialog box, complete these fields:
   - **Enter or select a description for the opportunity below.** Type or select a name from the F2 Lookup list.
   - **Templates of User.** Select the user or user group in the drop-down list.
   - **Please select a template of the selected user.** Select in the drop-down list. The templates displayed are owned by the user selected in the Templates of Users field.

   Click **Next.**

6. At the Overview dialog box, complete these fields:
   - **Manager.** Select the owning user or user group in the drop-down list.
   - **Code.** Type or select a code from the F2 Lookup list.
   - **Probability.** Type or select the percent probability of success.
   - **Stage.** Type or select the stage the opportunity is beginning at. This field commonly defaults to 10 - Initial Contact.
   - **Source.** Type or select the source of the opportunity from the F2 Lookup list.

- **Start Date.** Type or select the starting date from the F2 graphical calendar.

- **Close by.** Type or select the ending date from the F2 graphical calendar.

Click **Next.**

7. At the Influencers dialog box, click **New**, **Edit** or **Delete** and complete the appropriate window.
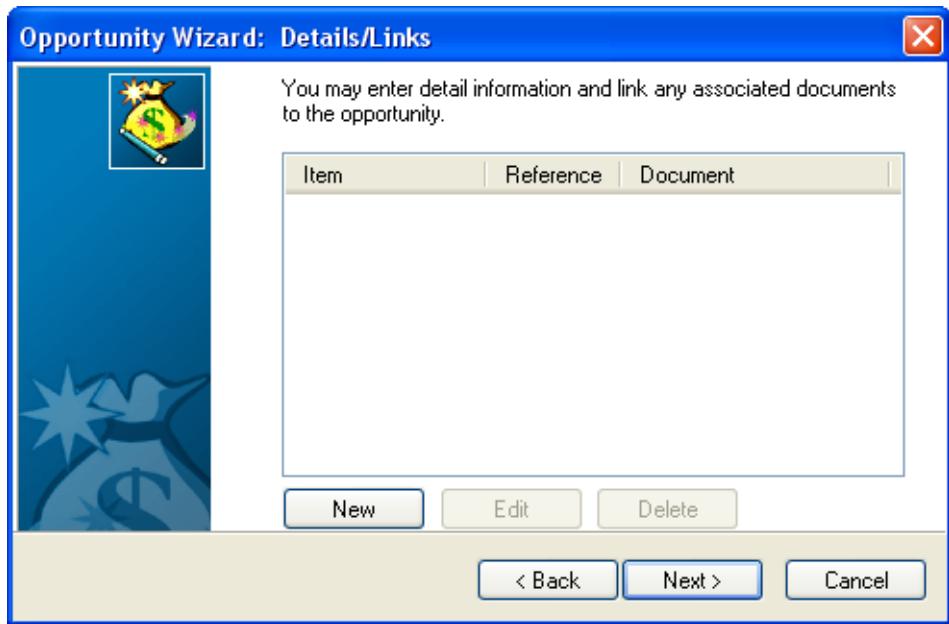
Click **Next.**
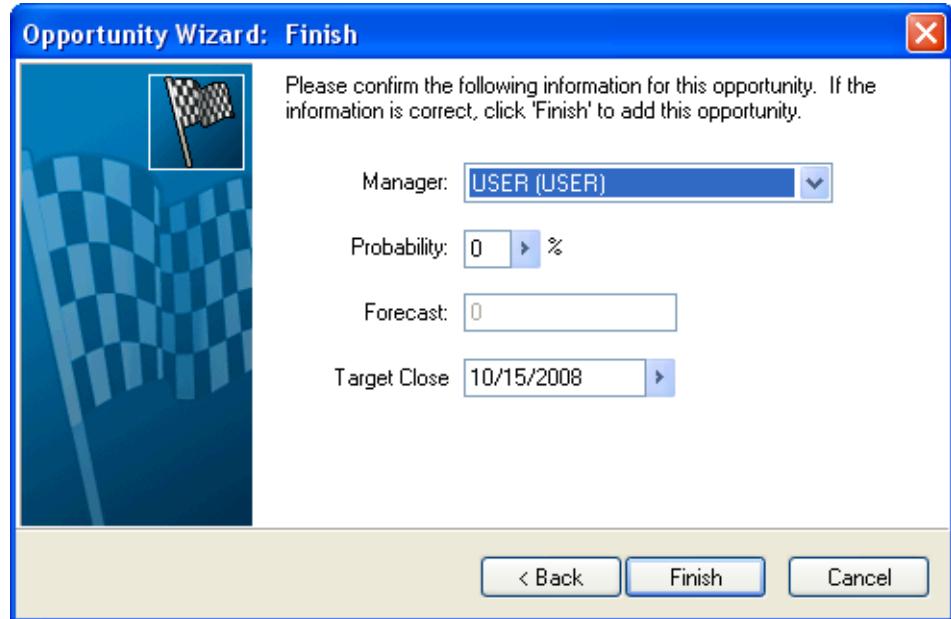
8. At the Finish dialog box complete these fields:

- **Manager.** Select the user or user group in the drop-down list.
- **Probability.** Type or select the percent probability of success from the F2 Lookup list.
- **Forecast**. The field auto-populates based on data entered in the **Forecasted Sales** dialog box.
- **Close by.** Select the closing date from the F2 graphical calendar.

9. Click **Finish.**

The opportunity is added to the upper pane of the Opportunity Manager.

Using the Project Manager

The Project Manager enables you to oversee complex projects involving many components.

Use the following procedure to open and use the Project Manager.

1. Select **Go To>>Projects.**

2. At the Project Manager window, use the icons on the toolbar to perform general actions and the local menu for other actions.

3. To create a project, right-click the upper pane and select **New**.

    See "Creating Projects" on page 279.

4. Select the project and manage project details using the tabs:

    • **Contacts.** Contacts associated with the project. See "Editing Project Contacts" on page 280.

    • **Task.** Schedule a plan of action with specific tasks assigned to users or user groups. See "Editing Tasks" on page 281.

    • **Team.** GoldMine users and contacts contributing to the project. See "Editing Teams" on page 282

    • **Issues.** Possible roadblocks to the successful completion of the project. See "Editing Issues" on page 283.

    • **Notes.** Type free-form notes related to the project. See "Editing Notes for Opportunities and Projects" on page 284.

    • **Details/Links.** Displays simple details; lets you link documents. See "Editing Details/Links" on page 284.

    • **Pending.** Scheduled activities for the project. See "Editing Pending Activities for Opportunities and Projects" on page 285.

    • **History.** Completed activities for the project. See "Editing History Information for Opportunities and Projects" on page 286.

Creating Projects

Use the following procedure to create a project.

1. Select **Go To>>Projects.**
2. At the Project Manager dialog box, click **New**, or right-click and select **New>>New Project** from the local menu.
3. At the New Project Prompt dialog box, click:
    *   **Yes.** The Project Wizard appears. See "Using the Project Wizard" on page 288.
    *   **No.** The New Project dialog box appears.
4. Complete the following fields as needed and then click **OK**.
    *   **Company.** The company in the current contact record populates this field. To change the contact, click the Search button to the right and select a company from the Contact Search Center.
    *   **Contact.** Select the primary or additional contact in the drop-down list.

        The Contact field label will change according to the type of record selected. For example, if the selected record type is **Car**, then the field label will appear as **VIN#** with a drop-down list of Vehicle Identification Numbers.
    *   **Type.** Defaults to Project and cannot be changed in this dialog box.
    *   **Templates of User.** Select the user who is the owner of the template to use.
    *   **Please select a template of the selected user.** Select a template in the drop-down list. (See Creating Project Templates)
5. At the Project Properties dialog box, complete these fields as needed.
    *   **Project.** Type or select the project name from the F2 Lookup list.
    *   **Company.** Type the new company name if the name in the field is not the correct company name.
    *   **Manager.** Select the project manager in the drop-down list.
    *   **Code.** Select the project code by typing or selecting an entry from the F2 Lookup list.
    *   **Status.** Type or select.
    *   **Stage.** Type or select.
    *   **Source.** Type or select the source of the project from the F2 Lookup list.

- **Start Date.** Select the date the project starts from the F2 graphical calendar.
- **End Date.** Select the date the project should end from the F2 graphical calendar.
- **Actual End.** Defaults to the date displayed in the End Date. Updates when the project is completed.

6. Click **OK** to return to the Project Manager window with your new project listed in the upper pane.

   Each tab must be updated manually.

Editing Project Contacts

The Project Manager Contacts tab displays the Company, Contact, Title, and Role of related contacts. Edit the contacts using the Contacts local menu.

1. In the Project Manager, select a project and click the Contact tab in the lower pane.
2. Right-click and select **New.**
3. At the Contact dialog box, edit the fields:
   - **Company**. Click the search button to the right to launch the Contact Search Center and select the company.
   - **Contact**. The contacts and additional contacts listed in the drop-down list depend upon the company selected.
   - **Title**.Type or select the contact's official title.
   - **Role.** Type or select the role defining the contact's relevance to the project.
   - **Notes.** Type in extra information about the contact.
4. To change a linked contact, right-click and select **Relink to Another Contact.** The Contact Search Center appears. Double-click the new contact you want to link to.
5. To display the Contact Record of the selected contact in the Project manager, right-click and select **Go to Contact Record**.

   The Contact Record window displays the selected contact.
6. To delete a contact from the list, right-click and select **Delete**.
7. To edit the information in the Contact dialog box, right-click and select **Edit.**

Editing Tasks

The Tasks tab in the Opportunity Manager and the Project manager displays Reference, Status, Priority, and User columns, as well as a Gantt chart calendar. **Tasks** represent the scheduled plan of actions for the successful completion of an opportunity or project. Edit tasks using the local menu.

Use the following procedure to edit tasks.

1. In the Opportunity or Project Manager, click the **Tasks** tab in the lower pane. Right-click and the local menu appears.

2. To view the Gantt chart for tasks outside the viewing dates, right-click and select **Go to Task**.

   The Gantt chart jumps to the starting date for the selected task.

   > **NOTE:** To change the date ranges displayed in the Gantt chart calendar, right-click the chart. Each right-click on the chart takes you up one level, starting at weekly and going on to monthly, yearly, and so on. To go down an increment, left-click for each level.

3. To mark a task as completed, right-click and select **Complete**.

   The task is marked out on the calendar and the Status column is updated to **Completed**.

4. To locate a particular task, use the **Find** option.
   - Right-click and select **Find**.
   - Type a character string in the **Find What** box on the Find dialog box.

     A character string is any series of alphanumeric characters (including spaces) treated as a group.

5. To send data in the Task tab to an outside format, right-click and select **Output to**.

   Select from Send data to the printer (as a GoldMine Report), Word, Excel, or the clipboard.

6. To change the options for a task, right click and select **Edit**.

   At the Task dialog box complete the following fields as needed.

   - **Reference.** Type or select a predefined reference from the F2 Lookup list.

- **Status.** Type or select a status level for the task.
- **Start Date.** Type or select the beginning date of the task from the F2 graphical calendar.
- **End Date**. Type or select the date the task should be completed from the F2 graphical calendar.
- **User.** Select the user or user group the task is assigned to in the drop-down list.
- **Priority.** Type or select the rank from the F2 Lookup list.
- **Color**. In the drop-down list, select the color to displays for the task on the Gantt chart calendar.
- **% Done.** Using the up and down arrows, select the percent of the task completed.
- **Notes.** Add notes as needed.
- **Completed Task.** Select this option if the task is already completed. The Status in the Task tab is updated as (Completed).

7. To remove the task from the list, right-click and select **Delete.**
8. To add a task, right-click and select **New**.

Editing Teams

The Team tab displays Member, Title, Department, and Role columns. Edit the team using the local menu.

Use the following procedure to edit teams.

1. In the Opportunity or Project Manager, click the Team tab in the lower pane.
2. To change settings for a team member, right-click and select **Edit**.
3. At the Opportunity or Project Team Member dialog box, complete the fields as needed.
    - **Type.** Select User (for GoldMine users) or Other Contact (for a contact in the database).
    - **Member.** If you selected User, the drop-down list displays users to choose from. If you selected Other Contact, click the search button to the right and locate the contact to add in the Contact Search Center. Then select one additional contacts in the drop-down list.
    - **Title.** Type or select the team member's title from the F2 Lookup list.
    - **Department.** Type or select the team member's department.

- **Role.** Type or select the team member's role in the opportunity or project from the F2 Lookup list.
- **Notes.** Type specific notes related to the team member.

4. To display the **Contact Record for the Other Contact**, right-click and select **Go to Contact Record**.

   The contact displays in the Contact record window.

5. To remove the team member from the list, right-click and select **Delete**.

6. To add a team member, right-click and select **New**.

Editing Issues

The Issues tab displays Priority, Date, Status, Issue, and User columns. Edit issues using the local menu.

Use the following procedure to edit issues.

1. In the Opportunity or Project Manager, select the **Issues** tab in the lower pane. Right-click, and the local menu appears.

2. To update an issue, right-click and select **Edit**.

3. At the Issue dialog box, complete the fields as needed.
   - **Issue.** Type or select a descriptive title for the issue from the F2 Lookup list.
   - **Status.** Type or select a status.
   - **Priority.** Type or select a relative priority for the issue from the F2 Lookup list.
   - **Date.** Click on the F2 Lookup arrow to select a date using the graphical calendar.
   - **User.** Select the user in the drop-down list.
   - **Notes.** Type a complete description of the issue.

4. To remove the task from the list, right-click and select **Delete**.

5. To add an Issue, right-click and select **New**.

Editing Notes for Opportunities and Projects

The Notes tab displays a general text box. Edit the notes using the local menu.

Use the following procedure to edit notes.

1. In the Opportunity or Project Manager, click the **Notes** tab in the lower pane.
2. To add a note, click the mouse in the text box. A blinking cursor appears. Type text to add to the note.
3. To edit the note, highlight the text to alter and right-click.
4. At the local menu, complete the fields as needed.

Editing Details/Links

In the Opportunity or Project Manager, the Details/Links tab links documents, program executables, and Web sites to the opportunity or project. The tab displays Item, Reference, and Linked Document columns. Edit the Detail/Links information using the local menu.

Use the following procedure to edit details and links.

1. In the Opportunity or Project Manager, select the **Details/Links** tab in the lower pane.
2. To change the options on a detail or link, right-click and select **Edit**.
3. At the Detail Properties dialog box, complete the fields as needed.
    *   **Item.** Type or select a name for the detail from the F2 Lookup list.
    *   **Reference.** Type or select a description of the item; or, if you are linking a Web site, type the URL. For example, www.frontrange.com.
    *   **Document is GoldMine Merge Form.** Select this option if linking a Word document you used with the document merge functionality.
    *   **Allow File to Synchronize.** Select a Detail/Link to synchronize to remote users.
    *   **File Name.** Browse to the location of the document or .exe to link.
4. To launch a linked document or .exe, highlight the detail, right-click, and select **Launch**.
5. To launch a linked Web site, highlight the detail, right-click, and select **Launch Web Site** from the local menu.

Editing Pending Activities for Opportunities and Projects

The Pending tab displays Activity, Date, Time, User, Code, Contact, and Reference columns. Edit the pending activities using the local menu.

Use the following procedure to edit pending activities.

1. In the Opportunity or Project Manager, select the Pending tab in the lower pane.

2. Right-click, and select **Zoom**.

   The Scheduled Activity Zoom window opens.

   • Scroll through the activities by clicking **Next** and **Previous**.

   • Click **Complete** to complete the activity or **Delete** to remove it from the list.

3. To complete an activity and file it in the History tab, right-click and select **Complete.**

   At the Complete an activity dialog box, update the fields and click **OK**.

4. To schedule activities, right-click and select **Schedule** and select an option.

5. To quickly send an email to the linked customer on a pending activity, right-click and select **Reply**.

   • At the Reply to an Activity dialog box, file the email in History, delete it, or retain it in the inbox. Notes can carry over.

6. To display only pending activities that meet a particular criteria, right-click and select **Options>>Filter**.

   At the Activity Filter dialog box, use the Find option to locate a particular detail.

   • Right-click and select **Find.**

   • Type a character string in the **Find What** box on the Find dialog box.

     A character string is any series of alphanumeric characters (including spaces) treated as a group.

7. To send the data in the Pending tab to an outside format, right-click and select **Output to**.

   • Send the **data to the printer (as a GoldMine Report)**, **Word, Excel**, or the clipboard.

8. To quickly update a many activities, right-click and select **Options>>Auto-Update**.

9. To remove the detail from the list, right-click and select **Delete.**

10. To add a Detail, right-click and select **New**.

Editing History Information for Opportunities and Projects

The History tab displays Date, User, Activity, Result, Code, Contact, and Reference columns. Edit history information using the local menu.

Use the following procedure to edit history information.

1. In the Opportunity or Project Manager, click the History tab in the lower pane.

2. To change options for a History record, right-click and select **Edit**.

3. Right-click and select **Zoom**.

   At the Completed Activity Zoom, scroll through the activities by clicking **Next** and **Previous**.

4. To display only history records that meet a particular criteria, right-click and select **Options>>Filter**.

   At the Activity Filter dialog box, to locate a particular record, use the Find option.

   • Right-click and select **Find.**

   • Type a character string in the **Find What** box on the Find dialog box.

     A character string is any series of alphanumeric characters (including spaces) treated as a group.

5. To send the data in the **History** tab to an outside format, right-click and select **Output to**.

   • Send the **data to the printer (as a GoldMine Report)**, **Word, Excel**, or the clipboard.

6. To remove the record from the tab, right-click and select **Delete.**

Editing Projects

The Project Manager Contacts tab displays the Company, Contact, Title, and Role of related contacts. Edit the contacts using the Contacts local menu.

Use the following procedure to edit a project.

1. In the Project Manager, select the project to edit.
2. Right-click and select **Edit**.
3. At the Project Properties dialog box appears, edit the fields as needed and then click **OK**.

Creating Project Templates

Use the following procedure to create a project template.

1. Select **GoTo>>Projects.**
2. At the Project Manager window click the **Toggle to Show Templates** button .

    The upper pane switches to the project templates and the first column is labelled **Project Template**.

3. Right-click in the upper pane and select **New** from the local menu.

    The Project Templates Properties dialog box opens.

    The settings you configure in the template are used when an opportunity is created based on the template. Carefully consider the settings, for example, the Acct. Manager becomes the default owner and therefore the default Manager of the opportunity. Users can change the settings as they create the opportunity.

4. Complete the fields as needed.
    *   **Template Name.** Type the name of the template or select a name in the F2 Lookup list.
    *   **Acct. Manager.** Select the user or user group in the drop-down list.
    *   **Code.** Type or select a code in the F2 Lookup list.
    *   **Default Status.** Type or select the starting status for the opportunities created using this template.
    *   **Default Stage.** Type or select the beginning stage for the opportunities created using this template.
    *   **Source.** Type or select the source of the opportunity.

- **Number of days to complete.** Type or select the number of days needed to complete the project.
- **Task dates to be based.** Select the date entered for tasks set up for the project. This date appears in both the Start Date and End Date fields of the Task dialog box.

5. Click **OK** to save and close.

Using the Project Wizard

The Project Wizard takes you through the process of creating a project, configuring basic information, and setting the initial information in the tabs. The Projects tab on the contact record displays the projects associated with the contact.

Use the following procedure to open and use the Project Wizard.

1. Select **Go To>>Projects.**
2. At the Project Manager window, right-click the upper pane and select **New**.
3. At the New Project Prompt dialog box, select **Yes.**

   The Project Wizard: Welcome dialog box opens. The Company defaults to the active contact record.

   For another contact record, click the search button to launch the Contact Search Center and then select the contact.

4. The contacts and additional contacts available in the **Contacts** drop-down list depend on the company selected. Select the contact for the project and click **Next.**

5. At the Description dialog box, complete the fields as needed.
   - **Enter or select a description for the project below.** Type or select a name from the F2 Lookup list.
   - **Templates of User.** Select the user or user group in the drop-down list.
   - **Please select a template of the selected user.** Select in the drop-down list. The templates displayed are owned by the user selected in the above field.

   Click **Next.**

6. At the **Overview** dialog box, completed as needed.
   - **Manager.** Select the owning user or user group in the drop-down list.
   - **Code.** Type or select a code from the F2 Lookup list.
   - **Stage.** Type or select from the F2 Lookup list the stage the project begins at.
   - **Source.** Type or select from the F2 Lookup list.
   - **Start Date.** Type or select from the F2 graphical calendar.
   - **Close Date.** Type or select from the F2 graphical calendar.
7. Click **Next** to view the Influencers dialog box. See "Editing Opportunity Influencers" on page 290.
8. Click **Next** to view the Team Members dialog box. See "Editing Teams" on page 282.
9. Click **Next** to view the Issues dialog box. See "Editing Issues" on page 283.
10. Click **Next** to view the Details/Links dialog box. See "Editing Details/Links" on page 284.
11. Click **Next** to view the Finish dialog box.
12. At the **Finish** dialog box, complete the following fields as needed:
    - **Manager.** Select the user or user group in the drop-down list.
    - **Code.** Type or select the code from the F2 Lookup list.
    - **Stage.** Type or select the beginning stage from the F2 Lookup.
    - **Close by.** Select the closing date from the F2 graphical calendar.
13. Click **Finish.**

The project is added to the upper pane of the Project Manager.

Editing Opportunity Influencers

The Influencers tab in the Opportunity Manager displays the Company, Contact, Title, Role, and Response Mode columns. Influencers are contacts associated with the Opportunity. Edit influencers using the local menu.

Use the following procedure to edit influencers.

1. In the Opportunity Manager, select the Influencers tab in the lower pane.

2. Right-click and select **Edit**.

3. At the Influencer dialog box, complete the fields as needed.

    •   **Company.** Click the search button to the right of the field and select Look up contact which launches the Contact Search Center.

        Select a contact, or select **Create a new contact** which launches the New Company and Contact dialog box to create a new contact record.

    •   **Contact.** The contacts and additional contacts listed in the drop-down list depend upon the company selected.

    •   **Title.** Type or select the contact's official title.

    •   **Role.** Type or select the role defining the contact's relevance to the opportunity.

    •   **Response Mode.** Type or select the way the influencer is likely to respond when contacted about a sale.

    •   **Notes.** Extra information about the influencer.

4. To change a linked contact, right-click the Influencer tab and select **Relink to Another Contact**.

    The Contact Search Center appears.

    •   Select the contact to exchanging with the highlighted contact from the Influencer tab.

5. To display the contact record of the selected contact in the Opportunity manager, right-click and select **Go to Contact Record**.

    The contact record displays.

6. To delete a contact from the list, right-click and select **Delete**.

7. To add an influencer, right-click and select **New**.

Marketing Tools

About the Leads Management Center

The Center provides a sequence of activities to help manage marketing activities related to the base of contacts and potential leads. Identify and track who brings in the lead, who and how contact is made, and the lead's progress through the sales cycle.
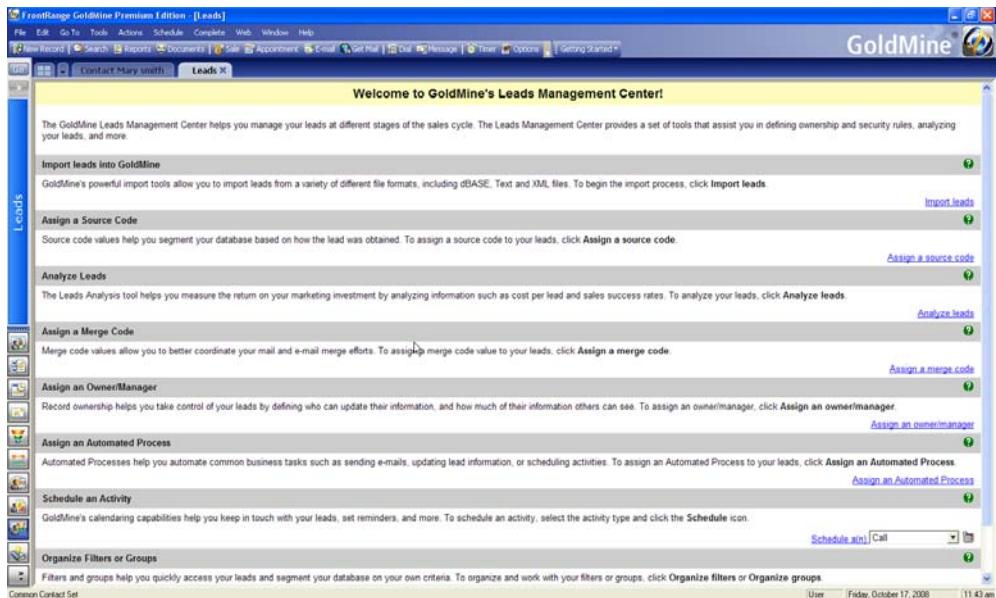
Use the Leads Management Center along with the Campaign Management Center and Web Import to design, test, and implement customer treatment strategies and campaigns to improve marketing efficiency and measure effectiveness.

Using the Leads Management Center

Use the following procedure to access and use the Leads Management Center.

1. Select **GoTo>>Leads Management Center,** or click **Administer leads** on the Getting Started toolbar.

2. At the Leads Management Center, select from these options to process your set of leads:

   • **Import data** from a variety of sources including ACT!, DBF, ASCII, SDF, SQL, or XML files.

   • **Assign an owner/manager** and record curtaining to control who can update or view a lead.

   • **Assign an Automated Process** to process the leads according to a predefined track of actions and triggers.

   • **Schedule an activity** to route, manage, and schedule one or more activities using calls, next actions, appointments, literature requests, forecasting sales, events, to-dos, and email communication.

   • **Organize filters/groups** to work with leads and filter and group. Create new, add or remove members from existing, or modify the criteria of filters and groups. To add a current lead to an existing filter or group you must walk through the steps of editing the filter or group.

   For more information on filters, see the *GoldMine 8.5 Administrators Guide*.

About the Campaign Management Center

One of GoldMine's marketing tools, this interface lets you view customer interactions from initial contact to closing the first sale to future purchases.

Use the Campaign Management Center, Web Import, and the Leads Management Center to design, test, and implement customer treatment strategies and campaigns to improve marketing efficiency and measure effectiveness. By tying sales and marketing promotions with customer data you can provide consistent, personalized customer experiences.

The Center interface contains three panes, a menu, and a toolbar. The navigation pane (tree view) displays each campaign. Expand a campaign in the tree to reveal its Open, Completed and Contacts folders. Select a folder to display details and contact names (in the right panes).

The Center tracks open/completed activities and which customers have been contacted. When you complete a scheduled activity generated from a campaign, GoldMine tracks the activity and records it as completed in the Completed folder. A completed campaign activity is also noted in the Contract Record History tab.

The Campaign Creation Wizard provides a checklist of activities for conducting a campaign. Use the Wizard to import data, schedule calls, perform mail merges, and run Automated Processes.

Click the **Configure Web Import** button on the toolbar. A wizard appears. Use it to create the HTML form and the script for Web imports. Web import capabilities help you collect contact information from interested visitors directly from your Web site, to feed that into marketing campaigns.

Campaign Local Menu

Access the local menu by right-clicking on a campaign in the **Campaign Management Center**.

```
New Campaign
Delete Campaign
Rename Campaign
Clone Campaign

New Task              ▶
Task Properties
Delete Task
Complete Task

Assign Contacts
Remove Contact
Sync Contact

Expand/Collapse
Expand All
Refresh
```
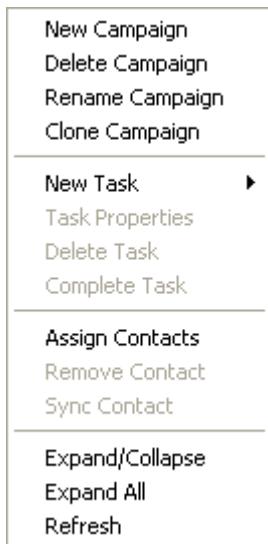
- **New Campaign.** Launches Campaign Creation Wizard.
- **Delete Campaign.** Removes selected campaign.
- **Rename Campaign.** Renames selected campaign.
- **Clone Campaign.** Copies selected campaign to a new campaign.
- **New Task.** Adds new task to selected campaign.
- **Task Properties.** Modifies selected campaign.
- **Delete Task.** Removes selected task from the campaign.
- **Complete Task.** After task is accomplished, marks it as complete.
- **Assign Contacts.** Opens the Contact Search Center.
- **Expand/Collapse.** Opens or folds up sub-entries in the navigation pane.
- **Expand All.** Opens all folders in the navigation pane.
- **Refresh.** Updates campaigns listed in the navigation pane.

Campaign Management Center Toolbar

New Campaign: Launches the Campaign Creation Wizard.

Clone Campaign: Copies selected campaign to a new campaign.

Rename Campaign: Changes given name of a campaign.

Delete Campaign: Removes selected campaign.

New Task: Adds new task to selected campaign.

Complete Task: Updates a task to Completed.

Delete Task: Removes selected task from campaign.

Task Properties: Modifies selected campaign task.

Assign Contacts: Opens the Contact Search Center.

Configure WebImport: Displays the WebImport Profiles dialog box.

Using the Campaign Management Center

Create, modify, or delete campaigns using the Campaign Management Center. Use the Toolbar or Navigation Pane Menu to access actions.

Use the following procedure to create, modify, or delete campaigns.

1. Select **Go To>>Campaigns**, or click **Campaigns** in the Navigation Pane.

2. At the Campaign Management Center, click **OK.**

3. At the Campaign Management Center dialog box, select an option:

   • **Create Campaigns.** See "Creating Campaigns" on page 296.

   • **Clone Campaigns.** See "Cloning Campaigns" on page 298.

   • **Rename Campaigns.** See "Renaming Campaigns" on page 299.

   • **Create a New Campaign Task.** See "Creating New Campaign Tasks" on page 299.

   • **Complete a Campaign Task.** See "Completing Campaign Tasks" on page 300.

   • **Delete Campaigns.** See "Deleting Campaigns" on page 300.

   • **Delete Campaign Tasks**. See "Deleting Campaign Tasks" on page 300.

   • **Modify Campaign Properties.** See "Changing Campaign Task Properties" on page 301.

Creating Campaigns

You can use marketing campaigns to consolidate a variety of communication activities.

Use the following procedure to create a campaign; it displays in the Campaign Management Center navigation pane.

1. Select **GoTo>Campaigns.**

2. At the Campaign Management Center window, in the navigation pane, right-click and select **New Campaign**, or click **New Campaign** on the toolbar.
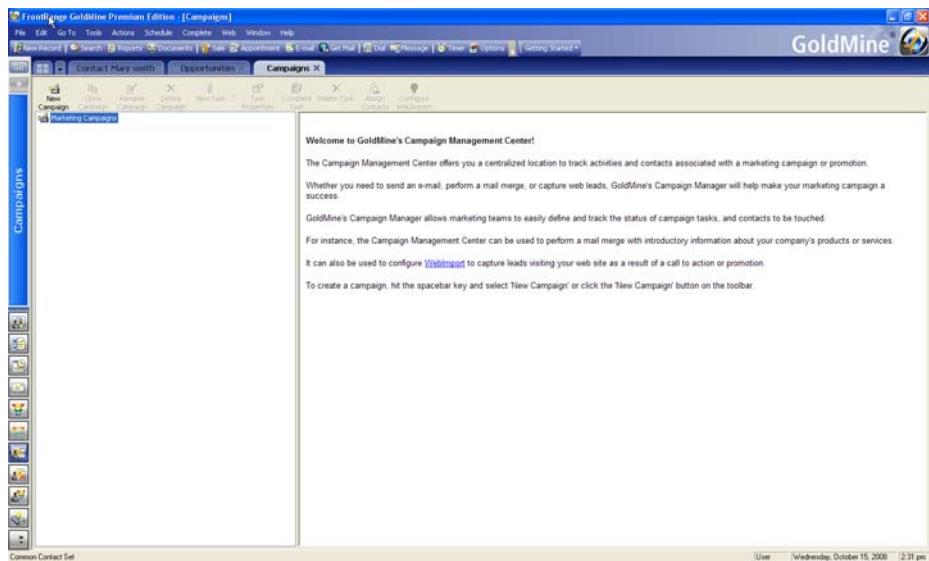
The Campaign Creation Wizard opens.

3. Click **Next.**

4. At the Select Contacts dialog box, select a filter or group from the drop-down list.

    •   To change the filters or groups to those of a different owner, select **<Filters of:>** or **<Groups of:>**.

        The Select a User dialog box opens.

    •   Select a user and then click **OK.**

        Click **Next**.

5. At the Assign tasks to this campaign dialog box, click **New task**.

6. Configure the following:

    •   **Import Data.** GoldMine provides several ways to import data. Select to open the Select Import Data Source dialog box.

    •   **Mail Merge.** Merge contact information with templates (document, envelope, or label). Select to open the Mail Merge Properties dialog box.

    •   **E-mail Merge.** Use templates to communicate a promotion to customers using queued Internet e-mail. Select to open the Mail Merge Properties dialog box appears.

- **Call.** Schedule outgoing telephone calls to initiate a contact or follow-up. Select to open the Schedule a Call dialog box. Only the Detail tab is available.
- **Automated Processes.** Use predefined or create new. Select to open the Select an Automated Processes dialog box.

You can add tasks as needed.

7. Click **Edit** to modify a task.

8. Click **Delete** to delete a task from the campaign.

9. Click **Next** to move to the **Summary of selections dialog box.**

10. Review the information presented. If you need to modify the tasks, click **Back**.

11. Click **Finish.**

Cloning Campaigns

Cloning a campaign is useful if you want to create a campaign with similar attributes to an existing campaign.

Use the following procedure to clone a campaign.

1. Select **GoTo>>Campaign.**

2. At the Campaign Management Center window, select a campaign.

3. Click **Clone Campaign.**

   GoldMine copies the campaign and displays it in the navigation pane with the same name and a number. for example, Chicago051604 cloned would appear Chicago051604 (1).

4. Select the cloned campaign and click **Rename Campaign.**

5. Type a new name and then press **Enter.**

Renaming Campaigns

Use the following procedure to rename a campaign.

1. Select **GoTo>>Campaign.**
2. At the Campaign Management Center window, select a campaign.
3. Click **Rename Campaign.**
4. The insertion point is positioned in the campaign name in enter mode.
5. Type a new name and then press **Enter.**

Creating New Campaign Tasks

Use the following procedure to create a new campaign task.

1. Select **GoTo>>Campaign.**
2. At the Campaign Management Center window, select a campaign.
3. Expand the **Open** folder and then click **New Task**.
4. Configure the following:
   - **Import Data.** GoldMine provides several ways to import data. Select to open the Select Import Data Source dialog box.
   - **Mail Merge.** Merge contact information with templates (document, envelope, or label). Select to open the Mail Merge Properties dialog box.
   - **E-mail Merge.** Use templates to communicate a promotion to customers using queued Internet e-mail. Select to open the Mail Merge Properties dialog box appears.
   - **Call.** Schedule outgoing telephone calls to initiate a contact or follow-up. Select to open the Schedule a Call dialog box. Only the **Detail** tab is available.
   - **Automated Processes.** Use predefined or create new processes. See the *GoldMine 8.5 Administrators Guide*.
5. Add tasks as needed and then click **OK**.

Completing Campaign Tasks

Use the following procedure to complete a campaign task.

1. Select **GoTo>>Campaign.**
2. At the Campaign Management Center window, select a campaign.
3. Expand the **Open** folder and select a task.
4. Click **Completed Tasks**.

    A confirmation prompt appears.

5. Click **Yes.**

Deleting Campaigns

Use the following procedure to delete a campaign.

1. Select **GoTo>>Campaign.**
2. At the **Campaign Management Center** window, select a campaign.
3. Click **Delete Campaign.**

    A confirmation prompt appears.

4. Click **Yes.**

> **NOTE:** If an Automated Processes process was attached to a campaign, GoldMine removes the process from the designated records.

Deleting Campaign Tasks

Use the following procedure to delete a campaign task.

1. Select **GoTo>>Campaign.**
2. At the Campaign Management Center window, select a campaign.
3. Click **Delete Tasks.**

    A confirmation prompt appears.

4. Click **Yes.**

Changing Campaign Task Properties

Use the following procedure to change a campaign task's properties,

1. Select **GoTo>>Campaign.**
2. At the **Campaign Management Center** window, select a campaign.
3. Expand the **Open** folder and select a task.
4. Click **Properties.**

   The specific task dialog box opens.

5. Change task properties as needed.

About WebImporting

Set up Internet Web sites to collect contact information from interested visitors. Use the data in GoldMine by creating a Web form that includes instructions for handling the data.

After the information is submitted, a Web server script can format the data into an Internet email message which can then be sent to a designated recipient. When retrieving the email message, GoldMine recognizes the import instructions and creates a contact record with data captured from the Web page. Or, if a WebImport contact duplicates an existing contact, update selected fields.

Service Center

About the Service Center

Case management functionality in GoldMine® Premium Edition provides customer service agents the ability to capture service requests, then filter and access the details of each case. The customer service center enables your entire service division to pursue, arrange and filter all service requests and optimize work flow throughout the day.

GoldMine Premium Edition case management features allow your service professionals to assign, escalate and resolve customer service requests quickly and efficiently. Quickly access customer service issues, route them to the service agent who can best solve the problem, and keep clients informed of their service request progress, all within your customized GoldMine environment.

Your GoldMine users can now accept incoming customer service requests from multiple sources, be alerted to upcoming and urgent cases, and get details for any open or closed service request. Individual agents and customer service managers can filter their daily case activities, improving work efficiency and enabling optimal customer care.

Using the Service Center
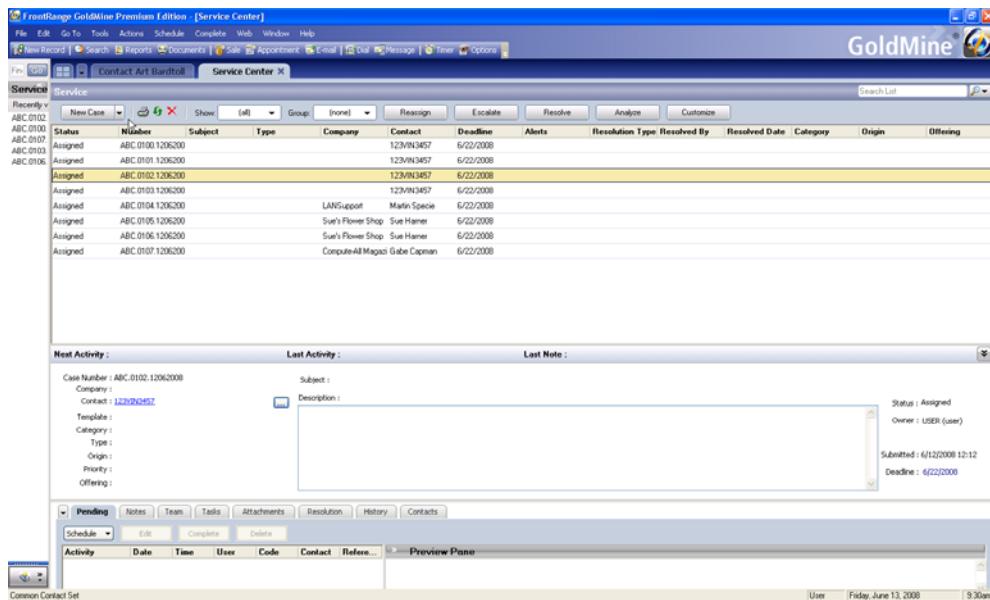
The Service Center window is divided into two sections; a **List** view and a **Detail** view.

Double-click on a case in the List view and the Details view opens.

Click on the bread crumb link in the upper left corner of the Service Center Details view to return to the List view.

Service Center List View

The Service Center list view consists of the following elements:

• A **Search field** for finding an existing case. Select the search field from the drop-down menu:
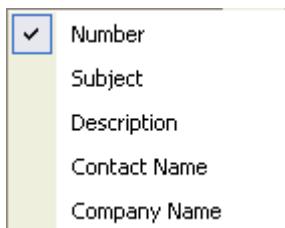
- A toolbar with buttons for managing the elements in the List view
- A case list displaying all existing cases in the database
- An Activity and Notes panel
- A Summary of the specified case

To switch to the detail view, double-click on a case in the list. Click the

chevron button in the right portion of the window to view both the case list and case details in the main window.

Using the Service Center Toolbar (List View)

The toolbar in the service center List view provides elements that allow you to view and manage details for cases. Open new cases and create case templates, choose viewing and grouping options, reassign, escalate, and resolve cases.

- **New Case /Template.** To open a new case, select **New Case** from the New Template drop-down menu
- **Show.** The Show menu allows you to filter the information displayed in the case list.
- **Group.** The Group menu allows you to group cases in the List view.
- **Reassign.** The Reassign Case dialog box allows you to assign the specified case to another user or service representative
- **Escalate.** Open the Escalate Case dialog, where you can escalate the specified case to a higher priority
- **Resolve.** The Resolve Case dialog box allows you to mark a case as **Resolved** and enter resolution notes and an email notification message.

Service Center Detail View

The Service Center Detail View consists of the following elements:

• A toolbar, which allows you to create new cases and templates, edit the status of the specified case, and analyze the specified case

• A Case Details window, which includes fields and drop-down menus that allow you to view and manage details for the specified case

• A Case Manager, a customizable workspace where you can schedule and manage activities, notes, tasks, and resources for the specified case.

To switch to the list view, use the chevron button in the top-right portion of the window.

Using the Service Center Toolbar (List View)

The toolbar in the service center List View provides elements that allow you to view and manage details for cases. Open new cases and create case templates, choose viewing and grouping options, reassign, escalate, and resolve cases.

• **New Case.** Click this button to create a new case or template.

• **Show.** Click this button to filter how your Cases list displays information, for examples **Open Cases** or **My Group's Cases**.

NOTE: The headings will change based on your selections.

• **Group.** Click this button to group your cases by category, for example, **Due Date** or **Owner.**

• **Reassign.** Click on this button to assign a specific case to a new service representative or reassign an existing case to a new service representative.

• **Escalate.** Click on this button to escalate a specific case to a higher priority.

• **Resolve.** Click on this button to mark a specific case as *Resolved* and enter resolution notes for the case.

Using the Service Center Toolbar (Detail View)

The Service Center Detail View toolbar provides the following elements, which allow you to view and manage details for an individual case:

The Service Center workspace tool bar consists of these buttons:

- **Reassign.** Click this button to open the Reassign Case dialog box where you can assign a case to a new service representative, or reassign an existing case to a new service representative.

- **Escalate.** Click this button to open the Escalate Case dialog box where you can escalate the specified case to a higher priority.

- **Resolve.** Click this button to open the Resolve Case dialog box where you can mark a case as **Resolved** and enter resolution notes for that case.

- **Abandon.** Click on this button to mark a specific case **Abandoned** and enter resolution notes for that case.

- **Templates.** Select from drop-down menu:
    - **Save as Template**. Open the Manage Case Templates dialog with predefined values populated from the specified case
    - **Manage Templates**. Open the Manage Case Templates dialog with predefined values not populated

- **Analyze.** Click this button to open the Case Management Analysis dialog box where you can filter performance data by user. You can also export this information to a Microsoft Excel spreadsheet or Microsoft Word.

- **Customize.** Click this button to customize the Customize Case Manager settings.

Creating a New Case

Use the following procedure to create a new service request (Case).

1. Select **GoTo>>Service Center** or select **Service** from the main Navigation Panel.

2. At the **Service Center**, click **New Case**.

The Contact Search Center window opens.
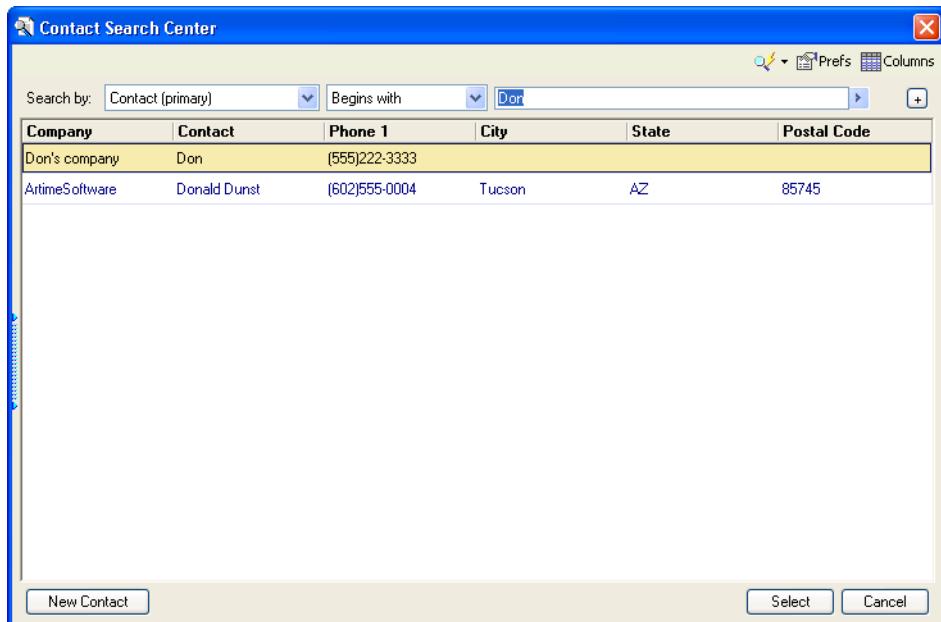
3. Double-click on a contact or group of contacts and click **Select.**

If you have many records listed, use the Search capability at the top of the window. For more information on using the Contact Search Center, see "Searching for Contact Records" on page 104.

• To create a case from a new contact, click **New Contact** and complete the **New Record** dialog box.

The Service Center window opens and the new case appears with a system-generated case number in the **Case Number** field. Depending on the case, some fields also may be system-generated.

4. Complete each field by clicking next to the field and either entering text in the field box or selecting values by clicking the down arrow on the box.

> **NOTE:** As the user, you (or your administrator) define the values in the drop-down box using F2 Lookup. If you have not created any values, no values will appear.

5. Click on the **Pending** tab and complete the dialog box as needed.

For more information on the Pending tab, see "Scheduling Activities" on page 143.

6. Click on the **Notes** tab and then click **Add Notes.**

Type any notes you have in the workspace, as needed and then click the **Save** icon in the top left side of the Notes workspace.

7. Click on the **Team** tab and complete the team information as needed.

- To add a team member, click **Add.** At the **Add Member** dialog box, select a user from the drop-down box and type in the user's role in the **Role** field.
- To edit a team member, either double-click on the team member or click on the team member and click **Edit**, and then make the changes.
- To delete a team member, click on the team member and then click **Delete.**

8. Click on the **Task** tab and complete the tasks properties as needed.

- To add a team member, click **Add** and complete the New Task dialog box.
- To edit a task, double-click on the task or select the task and click **Edit.**
- To mark a task Complete, click **Complete** and at the **Complete Task>>Options section**, select or type 100 in the **% completed** field.
- To print a task, select the task and click **Print>>Print.**
- To delete a task, select the task and click **Delete.**

9. Click on the **Attachments** tab and add attachments as needed.
   - To add an attachment, click **Add** and complete the New Attachment dialog box.
   - To delete an attachment, click on the attachment and click **Delete.**
   - To view an attachment, click **View.**
10. Click on the **Resolution** tab to add resolution information to the case, as needed.
    - To add a note, click **Add Note** and type the note in the workspace.
    - To search the Knowledge Base, click **Search Knowledge Base.**
    - To delete a Knowledge base entry, click **Remove Knowledge Entry.**
11. When an activity or task is competed, it is moved from the Pending or Tasks tab to the History tab. Click on the History tab and double-click on an activity or task to view additional details about the history of that item.
12. Click on the **Contacts** tab to view the contacts associated with this case.
13. Click on the **Save** icon in the toolbar to save the case.

Creating a New Template

The Template fields are based on typical service case categories and prioritization. For example, a template might be used when the service call center logs a request from a customer to repair a telephone that is under warranty.

Use the following procedure to create a new template.

1. At the Service Center, click the down arrow on **New Case>>New Template.**
2. The Edit Template dialog window opens.

3. At the **New Template Name** field, type a name for the new template.

4. Select or type or select appropriate F2 lookup field values and then click **Save.**

Cloning an Existing Template

Use the following procedure to clone or edit an existing template.

1. At the Service Center, click the down arrow on **New Case>>New Template** and then click **Save.**

   The **Manage Template** window opens.
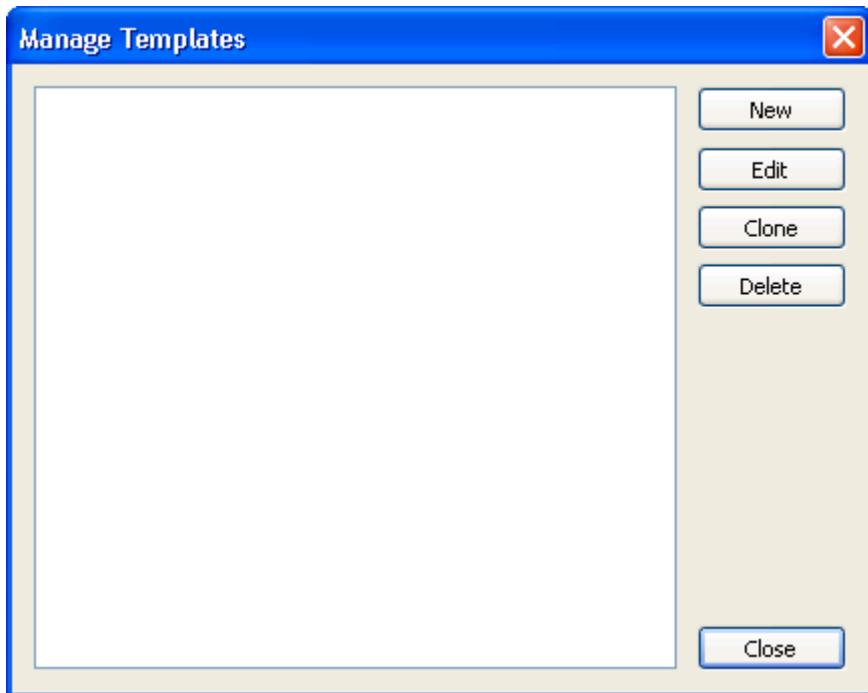
2. Select the template you want to clone or edit and click **Edit** or **Clone.**
3. Make the changes in the appropriate fields and then click **Save**.
4. To make changes on other templates, select the template and follow steps 3 and step 4, and then click **Close.**

Reassigning a Case

You can reassign a case to another user or another group.

Use the following procedure to reassign a case.

1. At the Service Center window, at the toolbar, click **Reassign.**

    The Reassign Case dialog box opens and displays the selected case's unique number.
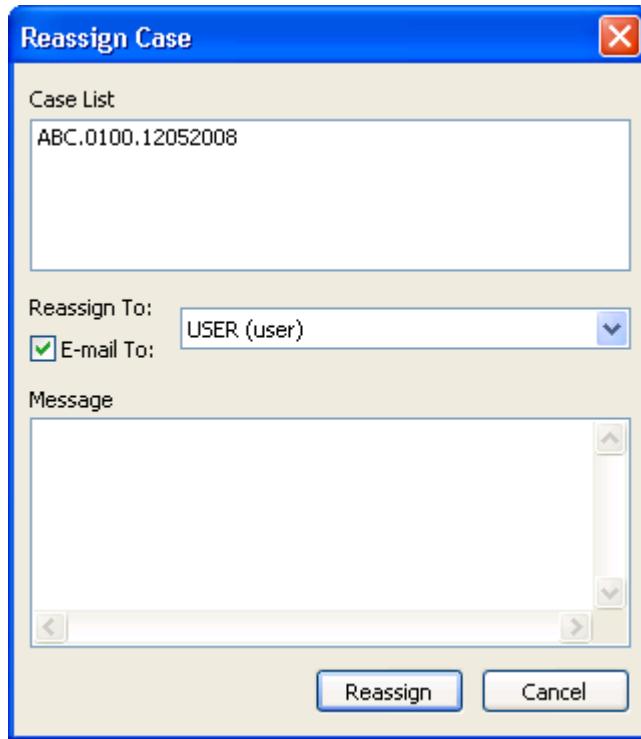
2. Click the **Use the Reassign To** drop-down menu to select a user to whom you will reassign the case.

    To notify the selected user of the reassignment via e-mail, make sure the E-mail Notification checkbox is checked, and type your message into the Message box provided.

3. Click **Reassign** to reassign the case or **Cancel** to exit the dialog without reassigning the case.

Escalating a Case

The Escalate function enables you to escalate a case to a higher priority.

Use the following procedure to escalate a case.

1. At the Service Center window, at the toolbar, click **Escalate**.

The **Escalate Case** dialog opens and displays the selected case's unique number.
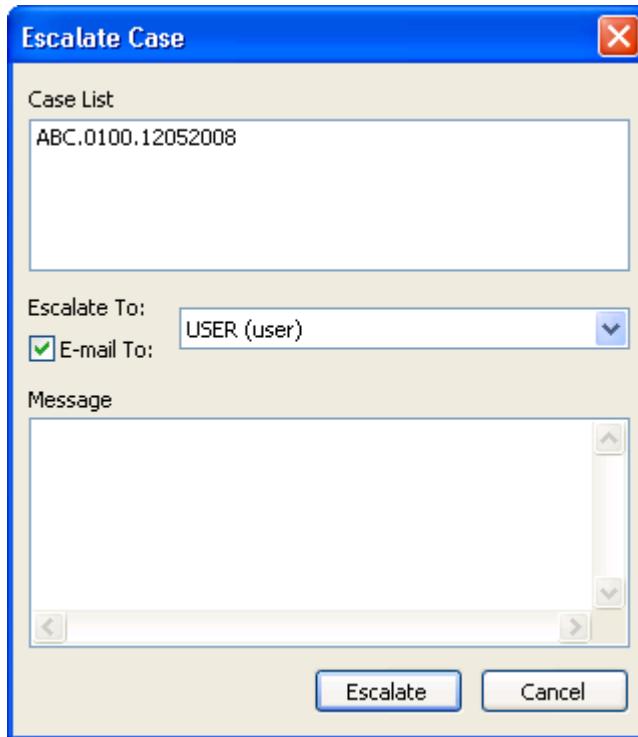
2. Click the **Escalate To** drop-down menu to select the user to whom you will escalate the case.

To notify the selected user of the escalation via e-mail, make sure the E-mail Notification checkbox is checked, and type your message into the Message box provided.

3. Click **Escalate** to escalate the case or **Cancel** to exit the dialog without re-escalating the case.

Resolving a Case

After a case is resolved, it is removed from the active list.

Use the following procedure to resolve a case.

1. At the Service Center window, at the toolbar, click **Resolve**.

The Resolve Case Dialog opens.
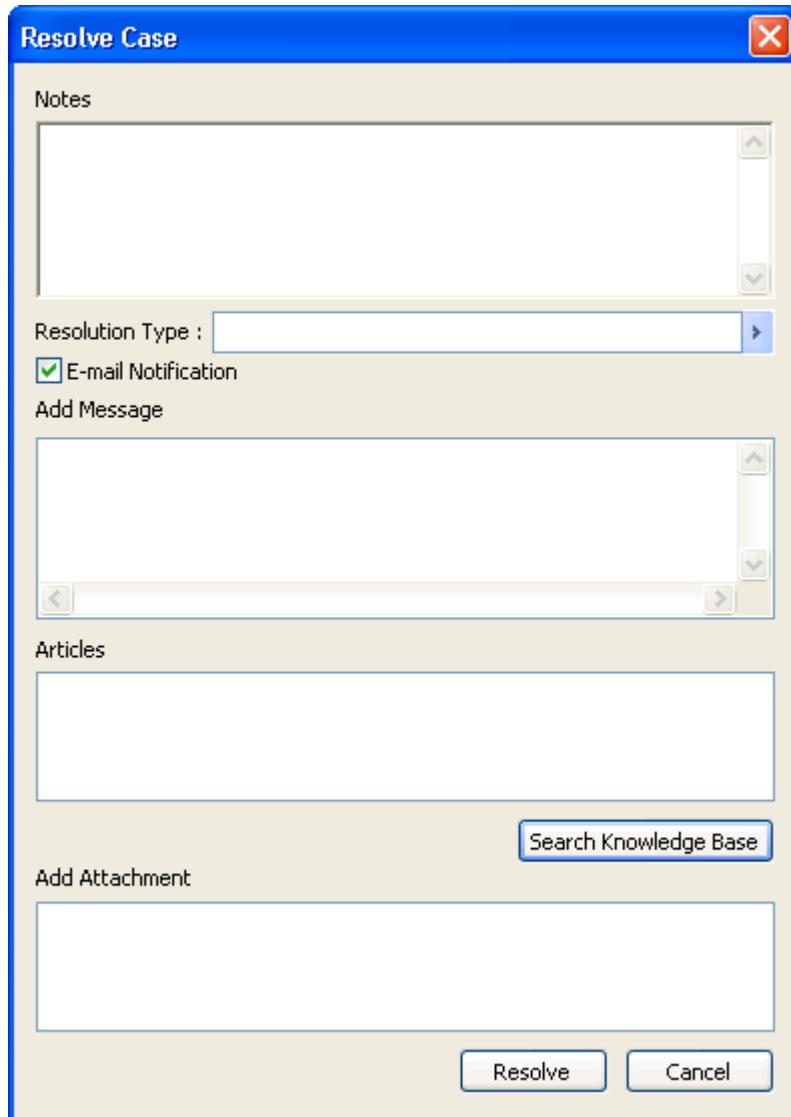
2. In the **Notes** field, enter information about the resolution of the case.

   • To notify the selected user of the resolution via e-mail, make sure the **E-mail Notification** checkbox is checked, and type your message into the Message box provided.

3. When finished, click **Resolve**, or select **Cancel** to exit the dialog without resolving the case.

Creating a Performance Report for a Case

Use this procedure to filter performance data by user and create reports.

1. At the Service Center window, at the toolbar, click **Analyze.**

   The Case Management Analysis dialog box opens.
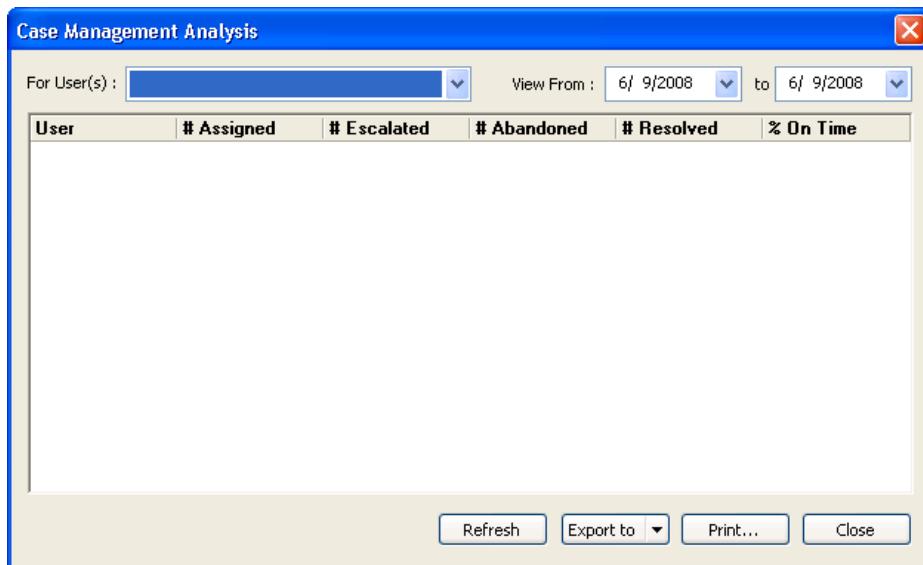
2. At the **For User(s)** drop-down box, select which user(s) to include in the report by selecting check boxes in the drop-down menu

3. Choose a date range for the report in the **View From** and **to** fields.

4. Sort the resulting data by any of the six columns:
   - User
   - **# Assigned.** The number of active cases currently assigned to this user.
   - **# Escalated.** The number of active cases escalated to this user.
   - **# Abandoned.** The number of cases changed to Abandoned status by this user.
   - **# Resolved.** The number of cases changed to Resolved status by this user.
   - **% On Time.** The percentage of cases resolved before deadline by this user.
5. Click **Refresh** to refresh results after entering new criteria.
6. Click **Export to** to export your report to either a Microsoft Word or Microsoft Excel document.
7. Click **Print** to print a hard-copy of your report to a local or network printer.
8. Click **Close** to close the Case Management Analysis dialog window.

Customizing Data Appearance

See the *GoldMine 8.5 Administrators Guide* for information about customizing how data appears in the Case Manager.

Knowledge Base

The Knowledge Base provides a resource for maintaining any type of information useful to an organization or an individual. It can provide easily accessible storage for graphics, multimedia files, and/or program applications. This information can then be linked to a contact record (displays the record whenever you access that topic).

The Knowledge Base consists of the **Knowledge Base**, and the **Personal Base.** Configure them to present newly added information to the user, control user reading and updating privileges, and search for specific entries based on user-defined criteria. Topic pages are arranged in outline format. Locate information by navigating through different sections, conducting a search, or opening a linked file.

Knowledge Base material is stored in the InfoMine table.

Users with Master Rights can set up user access to the Knowledge Base; each connected user can set up information in his or her Personal Base.

Using the Knowledge Base

Use the following steps to access the Knowledge Base.

1. Select **Go To>>Knowledge Base**, or select **Knowledge Base** from the main navigation pane. The **Knowledge Base** window appears.

2. Use the Knowledge Base toolbar to navigate and manage.

3. View information by selecting a tab:

   • **Knowledge Base**. Maintains information created by, for, and about an organization and available to multiple users.

   Depending on rights, all users can potentially view all Knowledge Base topics. However, only users with Master Rights can add, edit, or delete Knowledge Base items.

   • **Personal Base**. Maintains information useful to an individual user that only the user can view and update. The only way to access a PersonalBase is to log in to GoldMine as the user who created the PersonalBase.

4. Create, edit, and search the Knowledge Base. Set security and notification for users.

5. Create and edit topic text and linked files. See Adding HTML Text and Adding Attached Files.

6. Click **X** to close.

Knowledge Base Toolbar

 Adds a book to the Knowledge tree.

 Adds a folder to the selected book.

 Adds a topic to the selected book or folder

 Displays the Topic or Section Properties dialog box for the selected item.

Displays the Attach File tab of the Topic or Section Properties dialog box.

Deletes the selected item.

Displays a Table of Contents in the lower right pane of the selected book.

Displays the Search dialog box and allows you enter search terms.

Launches attachments, graphics, or other applications.

Creating and Editing Knowledge Base Books, Folders, and Topics

Organize information in the either Knowledge Base or Personal Base by creating high level books, internal folders, and pages to address individual topics.

To create Knowledge Base books, folders and topics

1. Select **Go To>>Knowledge Base**, or select Knowledge Base from the main navigation panel.

   The **Knowledge Base window** opens.

2. To create a book, click the **New Book** toolbar icon .

   At the **<new book>** in the left pane under *Knowledge Base*, type a name.

   Click in the right pane to add HTML text or click the **Attach a file** toolbar icon to add an attachment.

   Adding text or attachments at the book level is possible but will interfere with a book level Table of Contents. Adding a TOC replaces the text on the book, folder, or topic.

3. To add a folder, highlight the book to which you want to add the folder and click the **New Folder toolbar icon**. The new folder appears under the selected book.

    Type in the name of the folder.

    Click in the right pane to add HTML text or click the **Attach a file toolbar** icon to add an attachment.

4. To add a topic page, highlight the book or the folder to which you want to add the topic and click the **New Topic Page toolbar icon**.

    The new page appears under the selected book or folder.

    Type the name of the topic.

Adding HTML Text to Knowledge Base Topics

Use the capabilities of HTML to create pages in the InfoCenter.

The information provided here is specifically for the topic level, but is applicable at the Book and Folder levels.

To add HTML text to a Knowledge Base topic

1. In the **Knowledge Base window**, click the right pane.

    A blinking cursor and the HTML toolbar appear.

2. Type the information into the page, or copy and paste it in from other sources.

3. Right-click the text pane and use the local menu options to format your document an add features.

    The HTML lets you format the text in a pleasing display and add Internet hyperlinks and graphics.

4. Click **Save**.

Knowledge Base Topic Text Local Menu

To open the Knowledge Base topic local menu, right-click in the right pane of the Knowledge Base window.

The menu options are:

Save. Saves the page you have created.

Cut. Cuts the highlighted text.

Copy. Copies the highlighted text.

Paste. Pastes copied text to the location of the blinking cursor.

Delete. Deletes highlighted text.

Select All. Selects all the text on the page.

Font. Sets the font style, type, and size.

Paragraph. Sets text alignment on the page.

Style. Sets the text style, including format, heading, definitions.

Insert. Select the following.

Insert Picture. Select this option and the **Picture dialog box** opens. Browse to a saved file or type the hyperlink to a web-based picture.

Insert Link. Select this option and the **Hyperlink dialog box** opens. Select the file type to link and type the URL.

Spell Check. Select this option and the **Check Spelling dialog box** opens.

Save as File. Saves the HTML page you created as a separate file.

Print. Prints the page.

Edit HTML Source. Toggles the display from your formatted WYSIWYG to HTML source code. Edit the document in the HTML source code.

WYSIWYG means What You See Is What You Get. A WYSIWYG display allows you to see on the screen exactly what will appear when the document is printed.

HTML means HyperText Markup Language. The authoring language used to define the structure and layout of a Web document by using a variety of tags and attributes.)

Adding Attachments to Knowledge Base Documents

Attach existing documents to Knowledge Base topics to maintain such specialized documents as contracts, price charts, and invoice forms in other applications and launch them from InfoCenter. Attachments can also be other applications.

To add an attachment to a Knowledge Base document

1. Select the book, folder, or page to which to attach a file.
2. Right-click and select **Attach file**.
3. The **Attached File tab of the Topic Properties dialog box** opens.
4. In the **Attached file** field, type or browse to the location of the file to attach.

    If attaching an application, browse to the .exe file for the program.
5. Select **Synchronize the file to include the attachment** when the Knowledge Base information is synchronized to remote users.
6. Click **OK**.

    The path to the attached file appears on the right of the Knowledge Base toolbar and the Launch Attached File button is active.
7. To open the attached file or application, click the button, or right-click and select **Launch.**

Glossary

#

.gmb: (The file extension for a backup file created by the Back-Up Wizard)

.ics: (iCalendar file extension)

A

AccountNo: (The Account Number field uniquely identifies a contact record and is the common field value that links the Contact1 table to Contact2, Cal, ContSupp, ContHist, and OpMgr)

Action: (The Automated Process action is the activity performed when triggered)

Activities: (Activities are time-specific or event-based actions linked to contacts; for example calls, appointments, letters, or other types of activities, such as To Do tasks or events that are assigned to users)

Activity list: (A window that displays task or event information. The Activity List displays eleven categories of information in a set of tabs)

Additional Contact: (Individual associated with the primary contact, such as an administrative assistant. GoldMine stores this information in the Contacts tab of the primary contact's record)

Alphanumeric characters: (Letters A - Z and numeric digits)

Attachment: (A file, for example, a Word document, created outside of GoldMine and attached to GoldMine as a linked document, InfoCenter attachment, or e-mail attachment)

Auto-updating: (Allows you complete or delete many activities or resources)

B

Bcc: (Blind Carbon Copy. A copy of a message, usually e-mail, is sent to a recipient that the main recipients cannot see)

BDE: (Borland Database Engine. Serves as a connector between GoldMine and the databases)

Break fields: (Break fields manage the grouping of information, determining how multiple entry information, such as Details, Calendar, and History, is displayed in a report template. The break field ensures that all the details or calendar entries are grouped together before moving on to the next contact record. Break fields can only be used in Sort Headers)

C

Calculated field: (Field containing a mathematical expression rather than data)

Cc: (Carbon Copy. Used in e-mail messages, memos, and letters)

Character string: (Any series of alphanumeric characters (including spaces) that are treated as a group)

Cloning: (The process of copying a user or report settings and configurations in order to quickly create a new user or report)

CommonDir: (Used in the GM.ini, the CommonDir specifies the location of your default contact files)

Contact files: (The tables storing a database's contact information. Also referred to as Common files. The CommonDir line in the GM.ini points to the default contact files)

Contact record: (Standard unit of information in GoldMine. GoldMine's contact record incorporates standard information, such as name, company, phone, and address, and also serves as the basis for all scheduled work in GoldMine, acting as the central link between GoldMine's Calendar and History by maintaining all past and pending events related to the individual contact records in the GoldMine database)

Contact set: (Database consisting of the contact information: Contact1, Contact2, ContSupp, ContHist, ContGrps, ContUdef, Conttlog, and sometimes Lookup. GoldMine allows you to have more than one contact set)

Contact tabs: (Set of tabs located below the main Contact Record containing information associated with the contact, including additional contacts, pending, and history information)

Contacts tab: (Additional contacts associated with the Contact Record)

Curtaining: See Record curtaining

Custodian: (The person responsible for the resource)

D

Database: (A collection of data fields and related tables storing information that facilitates access and retrieval)

Details tab: (Structured, user-defined information associated with each Contact Record)

Dialog field: (A field created to open a dialog box and prompt the user for parameters to include in the report)

Digital ID: (Digital signature and encryption keys sent with e-mail messages)

E

Entity: (Used to refer to a single record type. Consists of a customized combination of primary fields views, custom screens, and GM+Views)

Event: (Step-by-step instructions contained in an Automated Process, or track, that GoldMine must evaluate to perform a specified series of activities. An event consists of a trigger and an action. An Automated Process consists of a sequence of one or more events)

F

F2 Lookup: (Special type of browse window that can be customized to contain frequently used or code-specific entries. Security options can control F2 lookups to ensure user input and allow standardization of data)

Field typing: (Customizing field labels and colors using direct data or dBASE expressions)

Fields tab: (Displays user-defined fields grouped together in user-defined screens)

File code: (The unique 3-character identification assigned to each Contact Set, enabling synchronization and backing up)

Filter: (Sort condition used to select a subset of records from the entire database)

Force log out: (Forces users out at a particular time or when inactive for a period of time)

Free/busy times: (Free and busy calendar times published to file, ftp, or http locations and made available to other users)

G

GM.ini: (A file located in the GoldMine directory containing commands for general GoldMine operation. The most important are the SysDir, GoldDir, and CommonDir)

GM+View tab: (User-defined HTML template-based views)

gmb: (The .gmb file extension for a backup file created by the Back-Up Wizard)

GoldDir: (Used in the GM.ini, the GoldDir specifies the location of your GoldMine files (also called your GMBase files))

GoldMine Business Contact Manager: (An installation of GoldMine using a D-License and a dBASE database)

GoldMine Business Contact Manager Corporate Edition: (An installation of GoldMine using an E-License and an optional SQL database. Includes GoldSync)

GoldMine e-mail: (E-mail message to another GoldMine user or user group)

GoldMine files: (The tables storing other database information. Also referred to as GMBase files. The GoldDir line in the GM.ini points to the shared GoldMine files)

GoldMine link to Excel: (Creates a link between GoldMine and Excel, allowing you to add GoldMine fields to Excel or export data from Excel to GoldMine)

GoldMine link to Word: (Creates a link between GoldMine and Word, allowing you to add GoldMine fields to a Word document or template)

GoldSync Server: (A computer that handles the synchronization processes)

GoldSync Service: (Runs the GoldSync application in the background without requiring a user to launch GoldMine)

Group: (Fixed set of contact records that meet an initial set of conditions. Once selected, member records subsequently have instantaneous access to the subset. Alternate method to filters of maintaining a subset of data)

H

History tab: (Completed activities associated with the Contact Record)

HTML: (HyperText Markup Language. The authoring language used to define the structure and layout of a Web document by using a variety of tags and attributes)

Hyperlink: (An element in an electronic document that links to another place in the same document or to an entirely different document. Click on the hyperlink to follow the link)

I

IIS: (Internet Information Services)

InfoCenter: (A resource used to maintain and display any type of information useful to an organization or an individual. The InfoCenter can archive information in a variety of formats, such as graphics, multimedia files, and program applications. Any of this information can be linked to a Contact Record)

Installing locally: (Installing GoldMine .exes and .dlls on a local workstation in a network environment)

Instant sync: (Automatically reminds undocked users to synchronize whenever a connection GoldSync is detected)

Internet e-mail: (E-mail message to customers using you POP3 e-mail account)

K

Keyboard shortcuts: See Shortcut keys

Keyword: (One or more words that succinctly describe a document's contents)

KnowledgeBase: (Information created by, for, and about an organization and available to multiple users)

L

Linked activities: (Scheduled activities linked to a contact record)

Links tab: (Documents, programs, and other files linked to the Contact Record)

Local menu: (Also known as a shortcut menu, the local menu provides quick access to a set of commands affecting only the current browse window, tab, or pane)

LogStamp: (Contains the time and date that the record was last changed)

M

Macros: (A series of commands and/or keystrokes that launches or runs a action)

Maintaining: (Process to improve performance by regenerating indexes, packing and rebuilding tables, and sorting and verifying data. The maintenance of the database should be performed by the system administrator or manager)

Members tab: (Lists the contact Groups of which the Contact Record is a member)

Merge codes: (Three-character codes used as the basis for e-mail and document merging for mass mailings)

N

Net-Update: (Process of updating GoldMine over the Internet)

Notes tab: (Free text notes associated with each Contact Record)

O

ODBC: (Open Database Connectivity)

Operator: (Specifies the value a field must have to be included in a record selection criteria. Examples of operators include the following: equal to, greater than, lesser than or equal to)

Opportunity: (Involves a group working as a team with multiple organizations and contacts to successfully close a complex sale)

Opptys tab: (Displays the Opportunities associated with the Contact Record)

Organization Chart: (Graphically displays contact information and organizational relationships in a tree structure)

P

Packing: (The process of actually deleting records that were marked for deletion. This process is only necessary for a dBASE database. Periodically packing the database files removes the "dead space" between records)

: (Activities scheduled for the Contact Record)

Personal Base: (Information useful to an individual user that only the logged-in user can view and update)

Primary contact: (The name of the contact on the Contact record)

Primary fields views: (Primary field views are customized views of the primary fields. Primary fields are those in the upper four panes of a Contact Record and are Contact1 fields)

Project: (Involves a group working as a team to complete a long-term project that involves multiple component tasks)

Projects tab: (Displays the Projects associated with the Contact Record)

R

Rebuilding: (Creates a new file structure (or table), and copies data, record-by-record, from the old files/tables to the new ones)

Record curtaining: (A Contact record can be curtained so that a user who does not own the record cannot view the record or can view only part of the record)

Record types: (Customized combination of primary fields views, custom screens, and GM+Views. Configured in the Record Types Administration Center)

Record Types Administration Center: (Allows you to create many Record Types based on combinations of your different Primary Field Views, Custom Screens, and GM+Views and to apply them based on your user-defined Record Type Rules)

Record typing: (Customized combinations of Primary Fields Views, Custom Screens, and GM+Views)

Rectype: (A record type code identifying different types of records within the database)

Referrals tab: (Internal referrals within the Contact Set)

Rehost: (Rehosting data is the process where one database is copied or converted to a new database)

Reports Center: (Provides easy visual access to several reporting options available within GoldMine)

Required field: (A field requiring data)

Resources: (Resources that are commonly requested include conference rooms, projectors, demonstration products, company vehicles)

Rich Site Summary: (See RSS)

RSS: (Rich Site Summary -- a simple XML format designed for sharing Web Headlines)

S

Screen design toolbar: (Used when you are designing your primary fields or Fields tab screens)

Seq: (Sequence ordered number for each event in an Automated Process. The sequence number begins with either P for a Preemptive event or S for a Sequential event. Each event is processed in order based on the sequence number)

Shortcut keys: (Shortcut keys are keyboard keys or key combinations that invoke a particular command)

Shortcut menu: See Local Menu

Site code: (Matches a synchronization process to a site)

Sort Header: (A section in a report that holds the labels, filters, and break filters for the section or for the corresponding detail section)

Sort order: (The order that Contact records are displayed based on a specified field. The sort order for the database is determined by the Sort Order you select in the Contact Listing window. If a filter or group is active, the Sort Field you selected takes precedence)

Sorting: (Orders the records in the files/tables by the most-used indexes)

Summary tab: (Displays activity information about the current Contact Record)

Synchronization: (GoldMine's remote synchronization is a process that can update one GoldMine system with new or changed information that has been entered in another GoldMine system)

SyncStamp: (Contains the time and date when the record was last successfully retrieved during synchronization)

SysDir: (Used in the GM.ini, it specifies the location of gmw6.exe)

T

Task group: (A group of task items on the GoldMine Taskbar)

Task item: (An item on a taskbar that launches an action)

Taskbar: (Frequently used GoldMine Menu commands and macros, links to documents and files, and a quick step for launching applications and web sites)

Tickets tab: (Displays tickets from HEAT Call Logging when GoldMine/HEAT integration is installed)

Tlogs: (The general name for the two types of logs: ContTlog and GMTlog. They track date and time stamps for changes to fields and the synchronization of the data)

Track: (A sequence of two or more events, which are the step-by-step instructions that GoldMine evaluates to perform a defined series of activities. Also known as an Automated Process.)

Tracks tab: (Lists the Automated Process tracks attached to the Contact Record)

Transfer set: (A database of all the changes made to Contact Records during a specified time frame. The database with the changes is sent to other GoldMine locations and retrieved, updating that database with the new information)

Transformation sheet: (A language for transforming XML documents into other XML documents)

Trigger: (A predefined condition in an Automated Process event that, when the condition is true, causes GoldMine to execute an action)

U

Unlinked activities: (Scheduled activities that are linked to a user but not to a contact)

URL: (Abbreviation of Uniform Resource Locator, the global address of documents and other resources on the World Wide Web)

User groups: (Users can be logically grouped according the functions that they perform)

User Preferences: (Various settings that control how GoldMine looks and acts for each user)

User Properties: (These settings define a user's security and access in GoldMine)

UserID: (Field that contains the name of the user an activity is assigned to. UserID is based on the GoldMine username)

Username: (Use this name to log into GoldMine. Identifies the user's activities)

Username.ini: (An initialization file located in the GoldMine directory that stores user's individual settings)

Username.tbi: (Stores the user's taskbar settings)

V

Verifying: (Ensures that the data is readable and that all sync fields in the synchronization records of the database file(s) are populated, and no unique fields are duplicated)

W

WYSIWYG: (What You See Is What You Get. Pronounced wizzy-wig. A WYSIWYG display allows you to see on the screen exactly what will appear when the document is printed)

X

XML: (Acronym for Extensible Markup Language. XML is a universal format that uses tags for exchanging structured documents and data on the Internet)

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